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ABSTRACT

This manual has been prepared to provide operating guidelines for admissions officers, financial aid officers, and registrars. The systems described herein were designed specifically for the predominantly Negro colleges, but the procedures are applicable to other 4-year liberal arts colleges with the following general characteristics: (1) small to medium enrollments (500-1,500 students), (2) limited graduate, research, and community service programs, (3) reliance on tuition and fee income for the major portion of operating revenues, (4) high percentage of students receiving financial aid, and (5) increasing competition from other institutions for the types of students they have traditionally attracted. The admissions office must, of course, assume principal responsibility for the enrollment objectives pertaining to freshmen, transfers, and special students. To be most effective in achieving its enrollment objectives, an institution must develop and execute carefully considered and coordinating programs for recruiting, admissions, financial aid, and registration. Sections of this manual cover: preparation of admissions plan; implementation of recruiting plan; processing inquiries and applications; preparation of financial aid plan; distribution of financial aid application material; award processing; registration and post-registration processes; student employment; preparation of master schedules; registration; grade reporting; degree audit; transcript requests; and management reporting. (Author/PG)

ED104293

A STUDENT RECORDS MANUAL

Guidelines for the Administration of College Admissions, Financial Aid, and Registration Programs

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NATIONAL ASSOCIATION OF COLLEGE AND UNIVERSITY BUSINESS OFFICERS
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1970

A STUDENT RECORDS MANUAL

Guidelines

for the Administration of College

Admissions, Financial Aid, and Registration

Programs

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with the Financial Assistance
of The Esso Education
Foundation

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Washington, D. C.

FOREWORD

A Student Records Manual is one of several important products of a long-term effort, with which the National Association of College and University Business Officers is proud to be associated, to help improve the quality of management at predominantly Negro colleges and universities.

This manual has been prepared by Peat, Marwick, Mitchell & Co., the consulting firm that has been engaged since 1967 in helping to advance cooperative studies that now have involved forty black institutions. The studies were initiated with grants from the Esso Education Foundation and extended with funding by The Ford Foundation. Publication now is accomplished with Esso Foundation support.

NACUBO has had a role in these activities from the beginning, and it is pleased that its participation enables it now to become the sponsor and publisher of manuals such as this. NACUBO is sponsoring publication because the institutional studies have covered *all* aspects of administration because *all* are relevant to the processes of planning. *A Student Records Manual* obviously is intended for, and will be of immediate usefulness to, admissions and financial aid officers and registrars, and the manual may be of greater interest in smaller institutions with special characteristics, including limited programs of research and graduate training and high proportions of students requiring financial aid. *A Student Records Manual* exists as a part of a larger effort to make available, from the work with the predominantly Negro institutions, results that may be significant to other colleges and universities that are examining their management systems.

An earlier product of the program was *A College Operating Manual*, also prepared by Peat, Marwick. A part of this manual, Section II, "Planning, Budgeting, and Accounting," was reprinted early in 1970 by the National Association and used as a textbook in a series of workshops for representatives of smaller institutions. Section III of the *Operating Manual*, "Personnel," has become the core of another National Association handbook now in preparation. Thus the present work fits into what is becoming a series of publications covering those aspects of administration that must be represented in the development of team approaches to institutional planning.

Many persons from NACUBO and from organizations with related interests have participated in the development of the studies of systems and in the processes of review of the proposed publications. The work with the colleges has been related to NACUBO through a Steering Committee under the chairmanship of Bernie A. Little, Vice President for Finance and Business Affairs at Southern University, whose associates included James W. Bryant, Division of Education and Research Special Projects, The Ford Foundation; Kenneth R. Erfft,

Vice President for Administration, Duquesne University; Donald S. Murray, Assistant to the President for Federal Relations, University of Pennsylvania, and James J. Ritterskamp, Jr., Vice President for Administration, Vassar College. But the production of *A Student Records Manual* has required, and has been given in generous measure, the attention and professional counsel of members of other National Association committees and of representatives of other associations, including particularly the American Association of Collegiate Registrars and Admissions Officers. Those who in addition to members of the Steering Committee contributed to the reviews and decisions relating to publication of *A Student Records Manual* have included, from AACRAO, J. Douglas Conner, Executive Secretary, and Robert Gebhartsbauer, of the Lehigh County Community College; and from NACUBO, Robert K. Hage, Director of Financial Aid at Dartmouth College; members of the Committee on Student Aid, particularly the chairman, Lloyd Keisler, Controller, Indiana University, and Allen B. Edwards, Treasurer, Allegheny College, member of the Committee on Programs for Small Colleges. This manual also had, in earlier stages of its preparation, the critical reviews and comments of five men who play significant roles in college entrance-financial aid fields. These are T. Leslie MacMitchell, Executive Association, College Entrance Examination Board, New York; Alexander G. Sidar, Jr., Executive Director, College Scholarship Service, New York; Ted S. Cooper, Executive Director, National Association of College Admissions Counselors, Evanston, Ill.; Kenneth E. Young, Vice President, American College Testing Program, Washington, D.C.; and Kenneth L. Wooten, Director of Financial Aid, University of Mississippi, and President, National Association of Student Financial Aid Administrators. Representatives of the United States Office of Education, Division of Financial Aid, particularly Carol McKenzie, also performed helpful reviews. For the assistance of each of these persons the National Association is most grateful.

In preparation of any publication such as this, involving the contributions of many individuals and of committees of readers and consultants over long periods of time, there may be differing views, here and there, on matters of statement, tone, incorporation of detail, or design of exhibits. Let it simply be said now, for the record, that neither Peat Marwick, whose basic work was of highest quality, nor any single reader or consultant carries responsibility for this manual as it exists. Every comment, critical or otherwise, was noted. But final responsibility for *A Student Records Manual* is assumed by members of NACUBO's Steering Committee. They, with others in NACUBO, hope only that the manual will find friends and good uses in the field of college and university administration.

September, 1970

TABLE OF CONTENTS

		Page Number
SECTION I	GENERAL INTRODUCTION	I-1
SECTION II	ADMISSIONS	
Introduction		II-1
Sub System I	PREPARATION OF ADMISSIONS PLAN	
	Narrative Procedures	II-4
	Flow Chart of Sub System	II-9
	Forms	
	A-101 Admissions Operating Policies	II-10
	A-102 Admissions Plan	II-11
	A-103 Recruiting Master Plan	II-12
	A-104 Recruiting Visit Result - Master Schedule	II-13
Sub System II	IMPLEMENTATION OF RECRUITING PLAN	
	Narrative Procedures	II-14
	Flow Chart of Sub System	II-17
	Forms	
	A-201 Visitation History Card	II-18
	A-202 Interviews Visitation Report	II-19
	A-203 Candidate Interview Report	II-20
	A-204 Admissions Status Report	II-21
	A-205 Application for Admission	II-22
	A-206 General Instructions for all Applicants	II-24
	A-207 Application Fee Receipt Form	II-25
	A-208 Application Master Control Card	II-26
	A-209 Application Material Request Card	II-27
	A-210 Secondary School Record	II-28
	A-211 Student Description Form	II-29
	A-212 Letter Requesting Interview Date	II-30
	A-213 College Report for Transfer Applicant	II-31
Sub System III	PROCESSING OF INQUIRIES AND APPLICATIONS	
	Narrative Procedures	II-34
	Flow Chart of Sub System	II-40
	Forms	
	A-301 Letter to Prospective Applicants	II-43
	A-302 Applicant File Folder	II-44
	A-303 Notification of Receipt of Properly Completed Application	II-45

TABLE OF CONTENTS (CONTINUED)

A-304 Letter Noting Omissions in Application for Admission II-46
A-305 Follow-up Letter to Applicant Advising Him to Mail His Application or His Fee Promptly II-47
A-306 Applicant Follow-up Letter II-48

Sub System IV ADMISSIONS DECISION AND NOTIFICATION
Narrative Procedures II-49
Flow Chart II-53
Forms
A-401 Notification of Rejection for Admission Letter II-54
A-402 Admit Letter to Applicants II-55
A-403 Instructions to Admitted Applicants II-56
A-404 Accept or Decline Admission and Housing Form Mailed to Admitted Applicant II-57
A-405 Tuition and Housing Deposit Receipt II-58

Sub System V PROCESSING OF APPLICANT RESPONSES
Narrative Procedures II-59
Flow Chart II-62
Forms
A-501 Notification of Receipt of Acceptance - Missing Items Letter II-63
A-502 Missing Items Follow-up Letter II-64
A-503 Admission Accept or Decline Follow-up Letter II-65
A-504 Acknowledgment of Receipt of Notification of Withdrawal of Admission Acceptance from Applicant II-66

SECTION III FINANCIAL AID SYSTEM

Introduction III-1
Sub System I PREPARATION OF FINANCIAL AID PLAN
Narrative Procedures III-4
Flow Chart of Sub System III-9
Forms
FA-101 Proposed Changes in Financial Aid Program Operating Policies for Fiscal Year Beginning III-10
FA-102 Financial Aid Award Guidelines Fiscal Year Beginning III-11
FA-103 Financial Aid Allocation Plan for Fiscal Year Beginning III-12

TABLE OF CONTENTS (CONTINUED)

Sub System II DISTRIBUTION OF FINANCIAL AID APPLICATION MATERIAL
- Narrative Procedures III-13
- Flow Chart of Sub System III-16
- Forms
  - FA-201 Letter of Instructions for Completing Financial Aid Application III-17
  - FA-202 Financial Aid Application Card III-18
  - FA-203 Applicant File - With Movable Tab III-19
  - FA-204 Financial Aid Applicant Check List III-20
  - FA-205 Guide to Meeting College Expenses III-22
  - FA-206 List of Students Currently Receiving Financial Aid or Requesting Aid III-23

Sub System III RECEIPT OF APPLICATIONS
- Narrative Procedures III-24
- Flow Chart of Sub System III-26

Sub System IV AWARD PROCESSING
- Narrative Procedures III-27
- Flow Chart of Sub System III-33
- Forms
  - FA-401 Letter Reminding Applicant to Submit Completed ACTP or CSS Financial Need Analysis Report III-34
  - FA-402 Letter Reminding Applicant to Submit Application Card III-35
  - FA-403 Roster of Financial Aid Awards III-36
  - FA-404 Financial Aid Master Card (3 pages) III-37
  - FA-405 Financial Aid Award Letter III-40
  - FA-406 Master Control Schedule - Financial Aid Plan Allocations III-41

Sub System V NOTIFICATION OF AWARDS
- Narrative Procedures III-42
- Flow Chart of Sub System III-45
- Forms
  - FA-501 Letter Informing Applicant That His Need is Not Sufficient to Receive Aid Through This College III-46
  - FA-502 Letter to Applicant Concerning His Revised Financial Aid Award III-47
  - FA-503 Financial Aid Status Report III-48

TABLE OF CONTENTS (CONTINUED)

Sub System VI REASSESSMENT OF FUND AVAILABILITY AND AWARDS

Narrative Procedures III-49
Flow Chart of Sub System III-53
Forms
FA-601 Financial Aid Reallocation Plan for Fiscal Year Beginning III-54
FA-602 Letter Informing Applicant of Amounts of Increases in His Financial Aid Awards Because of Additional Funds Available III-55
FA-603 Letter to Applicant Reducing Award Because of Academic Status or Not in Good Standing III-56

Sub System VII REGISTRATION AND POST REGISTRATION PROCESSES

Narrative Procedures III-57
Flow Chart of Sub System III-61
Forms
FA-701 Letter to Applicant Who Received Financial Aid Award(s) at Registration Time Without Supporting Documentation III-62
FA-702 Letter to Applicant With Amount(s) of Amended Financial Aid Awards Because of Additional Information Supplied by Applicant III-63
FA-703 Letter to Applicant Confirming Conditional Aid Award After Applicant's Parents Supplied Parents Confidential Statement/ Family Financial Statement III-64
FA-704 Letter to Applicant With Amount(s) of Amended Financial Aid Award(s) After Applicant's Parents Supplied PCS/FFS III-65
FA-705 Letter to Applicant Cancelling Conditional Financial Aid Award Because Applicant's Parents Failed to Furnish Required Financial Documentation (PCS/FFS) III-66

TABLE OF CONTENTS (CONTINUED)

Sub System VIII STUDENT EMPLOYMENT

Narrative Procedures III-67

Flow Chart of Sub System III-71

Forms

FA-801 Letter to All College Administrators and Department Heads Requesting Them to Reassess Their Ability to Use Student Employment and Advise if They Need More III-73

FA-802 Letter to Department Heads Confirming Number of Student Employment Positions Authorized in Budget and Asking for Details of Skills, Daily Student Schedules, and Names of Students Requested III-74

FA-803 Student Employment Control Schedule for Fiscal Year III-75

FA-804 Letter to Employment Supervisor Telling Him The Name of Student Employee Being Referred by Financial Aid Office and Requesting Supervisor's Signature of Agreement to Hire Student III-76

FA-805 Student Employment Agreement to be Signed by Student Employee and Financial Aid Director III-77

FA-806 Monthly Student Employment Time Record III-78

FA-807 Monthly Gross Earnings for Students in Work Program for Period Ending III-79

FA-808 Termination of Student Employment Signed by Supervisor III-80

FA-809 Letter to Student from Financial Aid Director Confirming Termination of Student Employment III-81

TABLE OF CONTENTS (CONTINUED)

SECTION IV REGISTRAR

Introduction		IV-1
Sub System I	PREPARATION OF MASTER SCHEDULE	
	Narrative Procedures	IV-4
	Flow Chart of Sub System	IV-8
	Forms	
	R-101 Course Information Sheets	IV-9
	R-102 Transmittal Letter	IV-10
	R-103 Scheduling Cell Matrix	IV-11
	R-104 Room Utilization Cards	IV-12
	R-105 Class Cards	IV-13
Sub System II	STUDENT ACADEMIC PRE-REGISTRATION	
	Narrative Procedures	IV-14
	Flow Chart of Sub-System	IV-18
	Forms	
	R-201 Student Academic Record	IV-19
	R-202 Course Request Form & Fee Bill	IV-20
	R-203 Statement of Degree Requirements	IV-21
	R-204 Instructions for Pre-Registration by Mail	IV-22
Sub System III	PRE-REGISTRATION AND STUDENT SECTIONING	
	Narrative Procedures	IV-23
	Flow Chart of Sub System	IV-27
	Forms	
	R-301 Notice of Course Enrollment	IV-29
	R-302 Notice that Course Enrollment Not Possible	IV-30
Sub System IV	REGISTRATION	
	Narrative Procedures	IV-31
	Flow Chart of Sub System	IV-38
	Forms	
	R-401 Request for Registration Clearance Action	IV-41
	R-402 Financial Aid Clearance Form	IV-42
	R-403 Student Information Card	IV-43
	R-404 Compliance Report Data Card	IV-44
	R-405 Selective Service Notification Request	IV-45
	R-406 VA Enrollment Certification Request	IV-46
Sub System V	CHANGE OF PROGRAM	
	Narrative Procedures	IV-47
	Flow Chart of Sub-System	IV-49
	Forms	
	R-501 Change of Program Form	IV-50

TABLE OF CONTENTS (CONTINUED)

Sub System VI	PREPARATION OF CLASS LISTS	
	Narrative Procedures	IV-51
	Flow Chart of Sub System	IV-53
	Forms	
	R-601 Class List and Instructor Grade Sheet	IV-54
Sub System VII	GRADE REPORTING	
	Narrative Procedures	IV-55
	Flow Chart of Sub System	IV-57
	Forms	
	R-701 Report of Instructor Grading Patterns	IV-58
Sub System VIII	PERMANENT RECORD MAINTENANCE	
	Narrative Procedures	IV-59
	Flow Chart of Sub System	IV-65
	Forms	
	R-801 Change of Name or Address Form	IV-67
	R-802 Change of Grade Form	IV-68
	R-803 Major Field Notification Form	IV-69
	R-804 Withdrawal from College Form	IV-70
Sub System IX	CERTIFICATION TO FEDERAL AGENCIES	
	Narrative Procedures	IV-71
	Flow Chart of Sub System	IV-73
Sub System X	DEGREE AUDIT	
	Narrative Procedures	IV-74
	Flow Chart of Sub System	IV-77
	Forms	
	R-1001 Application for Degree Form	IV-78
Sub System XI	PROCESSING TRANSCRIPT REQUEST	
	Narrative Procedure	IV-79
	Flow Chart of Sub System	IV-81
	Forms	
	R-1101 Transcript Request	IV-82
Sub System XII	MANAGEMENT REPORTING	
	Narrative Procedures	IV-83
	Flow Chart of Sub System	IV-85
	Forms	
	R-1201 Student Enrollment Report	IV-86
	R-1202 Distribution of Students by Credit Hours	IV-87
	R-1203 Room Utilization Report	IV-88
	R-1204 Room Utilization By Type of Room Report	IV-89
	R-1205 Report of Credit Hours Produced by Instructor	IV-90
	R-1206 Report of Credit Hours Produced by Department	IV-91

SECTION I

INTRODUCTION

This manual has been prepared to provide operating guidelines for admissions officers, financial aid officers, and registrars. It is a companion document to an earlier publication titled A College Operating Manual which covers planning, budgeting and accounting, personnel administration, and construction management. The systems described herein were designed specifically for the predominantly Negro colleges but the procedures are applicable to other four-year liberal arts colleges with the following general characteristics:

- Small to medium enrollments (500-1,500 students)
- Limited graduate, research, and community service programs
- Reliance on tuition and fee income for the major portion of operating revenues
- High percentages of students receiving financial aid
- Increasing competition from other institutions for the types of students they have traditionally attracted.

THE TEAM APPROACH TO PLANNING

The planning section of A College Operating Manual emphasizes the importance of a coordinated "team effort" in planning by a college administration to resolve the college's operating problems. It recommends that an institutional planning team, headed by the President and including representatives from all sections of the college community, prepare a long-range plan each year which identifies:

- The institution's goals and objectives
- The policies designed to achieve those goals and objectives
- The resources necessary to implement the policies

Among the fundamental elements of the plan are enrollment objectives, expressed by categories of students (male - female and resident - commuter, for example) and by academic program. These enrollment objectives become the basis for decisions relating to staffing, space, and financial requirements. Once the long-range plan is developed by the planning team and approved by the Board of Trustees, the first year's activity levels described in the plan become the operating objectives of the institution for the ensuing year.

THE TEAM APPROACH IN OPERATIONS

The Admissions Office must of course assume principal responsibility for the enrollment objectives pertaining to freshmen, transfer, and special students. However, the number of students who ultimately enroll is dependent not just upon the activities of the Admissions Office but other offices as well, notably the Office of Financial Aid and the Registrar. To be most effective in achieving its enrollment objectives, an institution must develop and execute carefully considered and coordinated programs for recruiting, admissions, financial aid, and registration. The effect of these programs can be enhanced by procedures which facilitate efficient and effective responses to applicants and students from all three offices, as well as prompt and accurate status reporting to the administration so that program adjustments may be made, if necessary, to achieve enrollment objectives. Therefore, the team approach does not stop with planning but continues on into the implementation process.

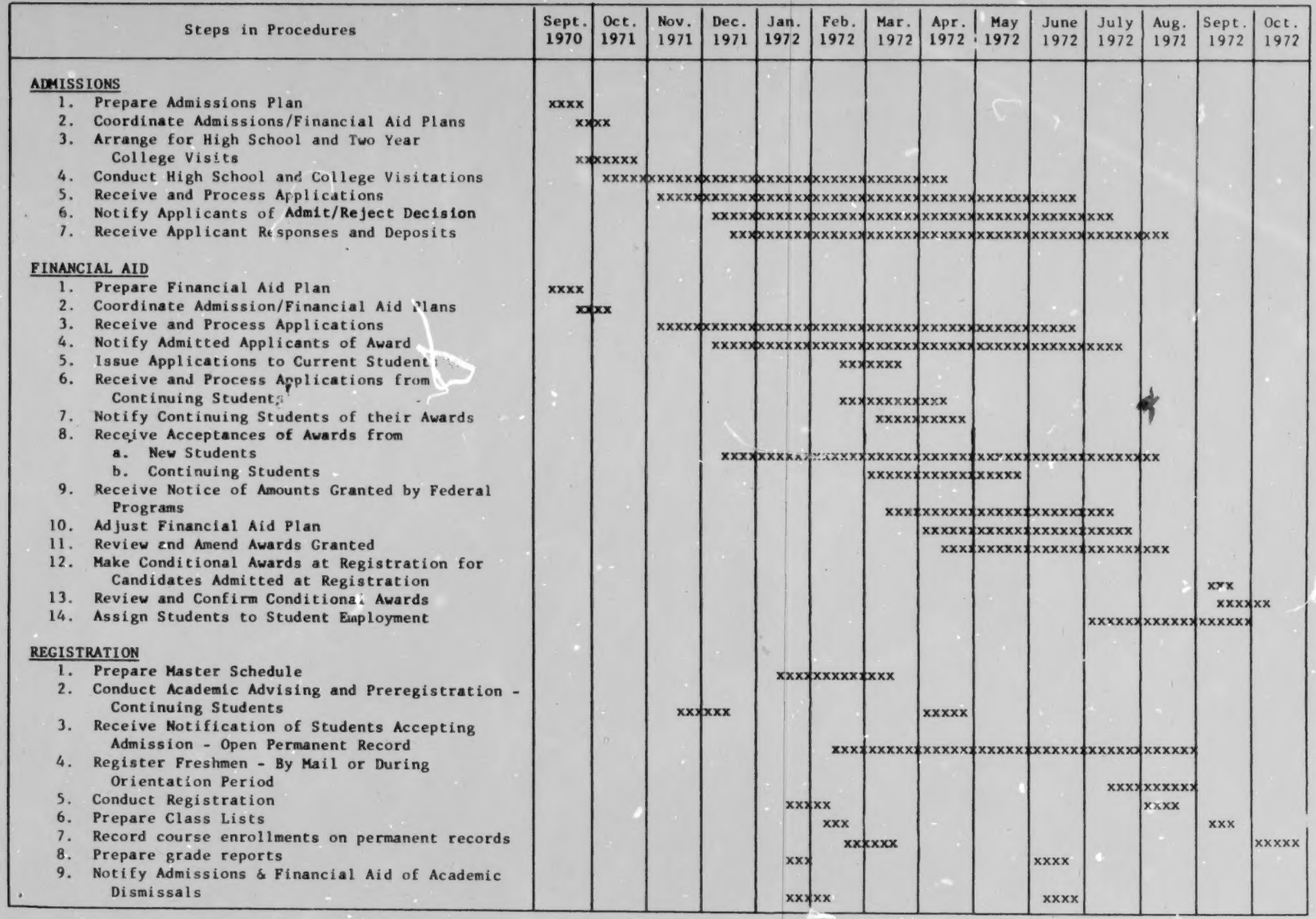
CONSIDERATIONS FOR THE USER

The significant features of the admission, financial aid, and registrar sections are described in more detail later. Several comments may be made, however, which apply to the three systems generally.

(a) Operating Schedules

Initiation of the preliminary activities in each of the three systems should begin at an earlier point in the academic year than is the normal practice

Time Frame for Procedures Applicable for Academic Year Beginning September 1971


Steps in Procedures
Sept. 1970
Oct. 1971
Nov. 1971
Dec. 1971
Jan. 1972
Feb. 1972
Mar. 1972
Apr. 1972
May 1972
June 1972
July 1972
Aug. 1972
Sept. 1972
Oct. 1972
ADMISSIONS
1. Prepare Admissions Plan
2. Coordinate Admissions/Financial Aid Plans
3. Arrange for High School and Two Year College Visits
4. Conduct High School and College Visitations
5. Receive and Process Applications
6. Notify Applicants of Admit/Reject Decision
7. Receive Applicant Responses and Deposits
FINANCIAL AID
1. Prepare Financial Aid Plan
2. Coordinate Admission/Financial Aid Plans
3. Receive and Process Applications
4. Notify Admitted Applicants of Award
5. Issue Applications to Current Students
6. Receive and Process Applications from Continuing Students
7. Notify Continuing Students of their Awards
8. Receive Acceptances of Awards from
a. New Students
b. Continuing Students
9. Receive Notice of Amounts Granted by Federal Programs
10. Adjust Financial Aid Plan
11. Review and Amend Awards Granted
12. Make Conditional Awards at Registration for Candidates Admitted at Registration
13. Review and Confirm Conditional Awards
14. Assign Students to Student Employment
REGISTRATION
1. Prepare Master Schedule
2. Conduct Academic Advising and Preregistration - Continuing Students
3. Receive Notification of Students Accepting Admission - Open Permanent Record
4. Register Freshmen - By Mail or During Orientation Period
5. Conduct Registration
6. Prepare Class Lists
7. Record course enrollments on permanent records
8. Prepare grade reports
9. Notify Admissions & Financial Aid of Academic Dismissals

at many colleges. The time frame for significant activities within each system is presented in the Gantt Chart shown on page I-3.

(b) Transfer Student Processing

The growth of the community college movement in the United States over the past twenty years has been exceptionally rapid. Many institutions have not yet taken full advantage of the opportunities to admit and enroll graduates of these colleges in upper division programs. The three systems described in this manual make provision for transfer student applications and for management reporting of activity related to transfer student enrollment objectives.

(c) Administrator References

Throughout the procedures, all functions described for each of the offices have been assigned to the senior administrator within that office, i.e., the Admissions Director, the Financial Aid Director, or the Registrar. Clearly, many of the functions described can be performed by clerical staff within those offices and should be, provided the staffing exists. We chose not to presume certain levels and organizations of staffing, however, and leave the delegation of duties to the discretion of the administrator concerned.

(d) Use of Forms

The manual includes a large number of forms and form letters. While forms can prove very helpful, they can also become a nuisance and an administrative burden if there are too many of them. Some of the documents described will be used with great frequency; others occasionally; and some only rarely. In several cases, examples of letters have been included in the manual primarily as a guide to content. Consequently, some forms may have insufficient use to warrant maintaining an inventory of them.

Insofar as possible, common forms sizes should be used, i.e., 3x5, 5x8, 5-1/2"x8-1/2", or 8-1/2"x11", to standardize filing requirements and reduce forms costs. Consideration should be given to the use of "snap-out" forms when multiple copies of a document are required. Forms which are filed, retrieved, and refiled a number of times should be printed on heavy duty card stock whenever possible to facilitate filing and to minimize mutilation through wear and tear.

(e) Adaptation to Electronic Data Processing (EDP)

The systems are designed for manual operation, incorporating some use of key-sort techniques. Consideration was given to the possible use of electronic data processing equipment on those campuses where it is available. At several points, the operation of the procedures could be enhanced by utilizing a modest punch card data processing system. Consequently, we have attempted to design the procedures so that EDP operations might be incorporated at the option of the user.

(f) Implementation of Generalized Systems

Finally, a note of caution should be introduced. The procedures presented in the manual are generalized for a group of institutions. Consequently, each institution wishing to use these procedures should examine very carefully the merits of the approach presented in relation to its own specific requirements. It may find that some procedures are unnecessary and may therefore be eliminated without adverse effect. Conversely, it may find that some procedures must be expanded to accommodate special requirements that the institution wishes to see fulfilled. In other words, the manual is intended to serve as a guide which presents one way of accomplishing activities that might well be accomplished in other ways. Each institution must decide for itself what is appropriate for it to use and implement accordingly.

SECTION II

ADMISSIONS

Many colleges and universities throughout the United States face a period in their existence in which they will have increased difficulty in achieving their enrollment objectives. To meet this challenge, the admission system must include procedures which encourage applications by desirable candidates, enhance the possibilities that applicants who are admitted will choose to enroll, and provide the institution with some advance knowledge of how many students to expect.

To accomplish these goals, the admissions system includes the following features:

1. Preparation of a detailed recruiting program which provides interviewers with the information and guidance they need to conduct effective interview sessions off campus.
2. Authority for interviewers to make tentative admissions decisions subject to the subsequent submission of appropriate application documentation by the candidates tentatively admitted.
3. Utilization of a "rolling admissions" procedure whereby admissions decisions are made promptly upon receipt of the necessary application documentation.
4. Periodic contact with the applicant to inform him of the status of his application.
5. Provision for an acceptance deadline, prior to which the applicant must indicate his intention to enroll or risk the loss of his admitted status.
6. Preparation of frequent admissions status reports which indicate progress-to-date against the enrollment objectives for the year, with separate reporting of freshmen, transfer, and special students.

The sequence of activities including application, admission and acceptance, when carried to completion, is a mutual commitment on the part of the student and the institution. Just as the student can expect the institution to act responsibly, we believe the institution has the right to ask that the student indicate that he is also acting in a responsible fashion. The institution is commiting itself to a level of operations on the basis of anticipated enrollments. It should be assured in some way that the applicant is serious in his intent both when he applies for admission and when he indicates his acceptance of an admission offer. Therefore, the admissions system includes procedures to process an application fee (paid by the applicant at the time he submits his application) and to process payment of a tuition deposit (paid by the applicant at the time he accepts the offer of admission).

We recognize that these policies may place some hardships on applicants from families of extremely limited financial resources. To counteract the possibility that a few candidates might fail to apply because they could not afford the application fee, we suggest that secondary school guidance counselors be informed that application fee waivers may be granted in cases of extreme need. In cases where applicants have valid reasons for requesting tuition or room deposit refunds, refunds may be granted if requested prior to the date that registration for the term commences.

One feature of the admissions system described earlier requires that an admitted applicant respond within a given period of time if he accepts an offer of admission. We should note that, if the offer of admission is extended to the student well before he is likely to receive possible notification of admission from other institutions, the period of time extended to him for acceptance of the admission offer might well take that factor into account. It would seem unfair to notify a student of his admission in, say, December and require him

to indicate his acceptance not later than February 1 since a February deadline probably would not permit him to consider other possible offers of admission which he might receive. Indeed, a stringent deadline of this type might result in few early acceptances and thereby fail to achieve its purpose.

We consider the regular periodic reporting of admissions status to be an important feature of the admissions system. Such reports are imperative if the recruiting and admissions plans are to be monitored and adjusted where necessary to achieve the enrollment objectives.

The Director of Admissions will be assisted in the formulation and establishment of admissions policy by the Admissions Committee. Since admissions policy involves consideration of academic achievement, financial need, and personal character, we suggest that the Admissions Committee be composed of the Dean of Students, the Admissions Director, the Academic Dean, a faculty representative, the Registrar, and the Financial Aid Director.

Students may also serve effectively as members of the Admissions Committee; if they do, care should be taken that they do not have access to personal data regarding individual applicants.

_____
(College Name)

Sub-System I. Preparation of Admissions Plan

Action	Performed by
Review Long-Range Plan to determine (1) Enrollment projection by program, sex, and class (2) Institutional policies concerning a. Percentage distribution between 1. Male/female students 2. Residential/commuting students 3. Full time/part-time or special students 4. In state/out of state/foreign students b. Other Policies 1. Special remedial programs offered to meet academic deficiencies 2. Programs to be strengthened, added or phased out during the next five years. 3. Housing priorities between freshman and transfer students in campus dormitories. (3) Desired Student Body Background 1. Educational 2. Economic or financial	Admissions Director

_____
(College Name)

Sub-System I Preparation of Admissions Plan (Cont'd)

Action	Performed by
3. Cultural 4. Geographical (4) Broad policies on recruiting (5) Broad policies on use of financial aid in relation to admissions and enrollment objectives.	
Prepare Statement of Admissions Operating Policies - Form A-101.	Admissions Director
Review Statement of Admissions Operating Policies.	Admissions Committee
If necessary, revise and resubmit Statement of Admissions Operating Policies.	Admissions Director
Approve Statement of Admissions Operating Policies.	Admissions Committee
Review historical admissions data. (1) Results of recent years recruiting and admissions activities.	Admissions Director
Review other data available: (1) Registrar's estimate of number of continuing students by a. Class b. Sex c. Program	Admissions Director

_____
(College Name)

Sub-System I. Preparation of Admissions Plan (Cont'd)

Action	Performed by
d. Full time/part-time status e. Residential/commuting status (2) Housing Director's estimate of number of beds available. a. Male - on campus/off campus b. Female - on campus/off campus c. Married - on campus/off campus (3) Admissions problems encountered last year (4) Changes this year which affect Admissions Plan	
Prepare Admissions and Recruiting Plans and select schools to be visited.	Admissions Director
Complete Forms A-102 Admissions Plan A-103 Recruiting Master Plan A-104 Recruiting Visits Result - Master Schedule (Complete planning portion only)	
Review Admissions and Recruiting Plans.	Admissions Committee
Revise, if necessary, and resubmit Admissions and Recruiting Plans.	Admissions Director
Approve Admissions and Recruiting Plans.	Admissions Committee

_____
(College Name)

Sub-System I. Preparation of Admissions Plan (Cont'd)

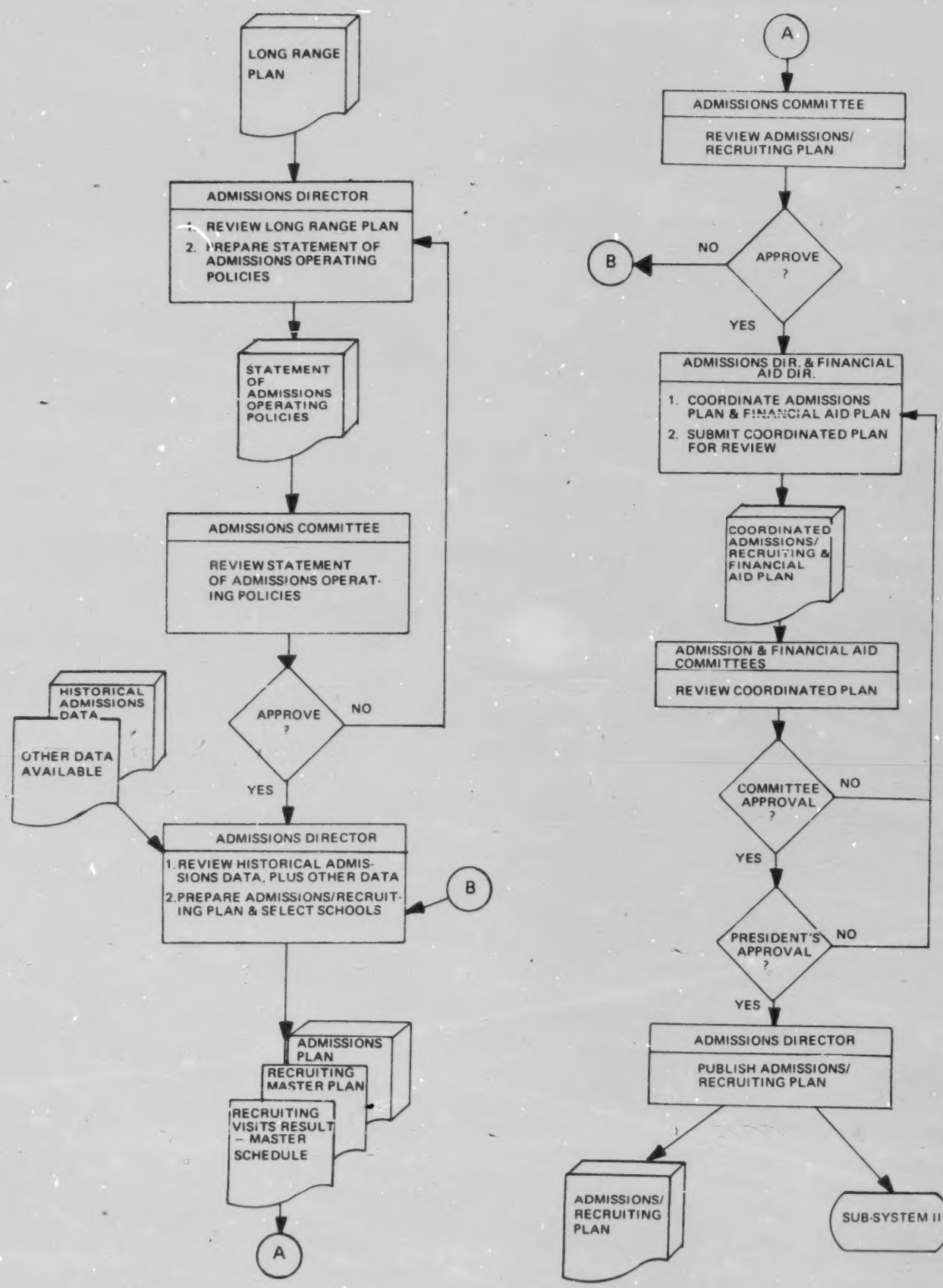
Action	Performed by
Coordinate Admissions and Recruiting Plans with Financial Aid Plan. Submit coordinated Admissions and Recruiting Plans and Financial Aid Plan for review and approval.	Admissions Director and Financial Aid Director
Review coordinated Admissions and Recruiting Plans and Financial Aid Plan.	Admissions Committee and Financial Aid Committee
Revise, if necessary, and resubmit Admissions and Recruiting Plans.	Admissions Director
Approve coordinated Admissions/Recruiting and Financial Aid Plan.	Admissions Committee and Financial Aid Committee
Submit approved Admissions and Recruiting Plans for President's review. Make necessary revisions before proceeding.	Admissions Director
Publish Admissions and Recruiting Plans. Distribute copies to: (1) President (2) Members of Admissions Committee (3) Admissions Director (Copies for interviewers) (4) Business Manager (5) Academic Dean (6) Dean of Student Services	Admissions Director

_____
(College Name)

Sub-System I. Preparation of Admissions Plan (Cont'd)

Action	Performed by
(7) Director of Development (Alumni)	
(8) Financial Aid Director	
(9) Housing Director	
(10) Public Relations Director	

SUB-SYSTEM I. Preparation of Admissions Plan



_____COLLEGE
ADMISSIONS OPERATING POLICIES
Fall Semester 19_____

POLICY FACTORS*	STATEMENT OF POLICY
1. ACADEMIC QUALIFICATIONS a. Freshman Applicants (1) Test Scores (2) Rank in Class (3) Academic Potential b. Transfer Applicants (1) College Grade Average (2) Requirements for Acceptance of Transfer Credits c. Special Programs (1) Upward Bound (2) Educational Talent Search	
2. CHARACTER REQUIREMENTS	
3. SPECIAL FACTORS IN ADMISSIONS CONSIDERATIONS a. Athletic, Musical, or other Distinctions b. Alumni, Present Students, or Influential Citizens in Applicant's Family c. Applicant Qualifications for Outside Scholarship	
4. CAMPUS HOUSING PRIORITY BY CLASS AND SEX	
5. PROGRAMS TO WHICH INTERVIEWER'S AUTHORITY TO INDICATE TENTATIVE ACCEPTANCE LIMITED a. Freshman b. Transfer	
6. CRITERIA REQUIRED TO PERMIT INTERVIEWERS TO INDICATE TENTATIVE ADMISSION ACCEPTANCE a. Regular programs 1. Freshman 2. Transfer b. Special Programs 1. Upward Bound 2. Educational Talent Search	

* Sample List - not intended to be all inclusive

_____ COLLEGE

ADMISSION PLAN

FALL SEMESTER 19____

ENROLLMENT CATEGORIES	LONG RANGE PLAN PROJECTION			CONTINUING STUDENT ESTIMATE						NUMBER TO BE ENROLLED						NUMBER TO BE ADMITTED TO ACHIEVE ENROLLMENT											
				MALE			FEMALE			MALE			FEMALE			REFERRALS, INQUIRIES & NORMAL RECRUITING						SPECIAL RECRUITMENT					
																MALE			FEMALE			MALE			FEMALE		
	Male	Female	Total	Com	Res	Total	Com	Res	Total	Com	Res	Total	Com	Res	Total	Com	Res	Total	Com	Res	Total	Com	Res	Total	Com	Res	Total
TOTAL HEAD COUNT																											
FRESHMAN																											
SOPHOMORE																											
JUNIOR																											
SENIOR																											
TOTAL UNDERGRADUATE																											
GRADUATE																											
TOTAL																											
	Full Time	Part Time	Total	Full Time	Part Time	Total	Full Time	Part Time	Total	Full Time	Part Time	Total	Full Time	Part Time	Total	Full Time	Part Time	Total	Full Time	Part Time	Total	Full Time	Part Time	Total	Full Time	Part Time	Total
FRESHMAN																											
HUMANITIES																											
SOCIAL SCIENCES																											
EDUCATION & PSYCHOLOGY																											
MATHEMATICS & SCIENCES																											
BUS. ADMINISTRATION																											
UNSPECIFIED																											
UPWARD BOUND																											
EDUC. TALENT SEARCH																											
OTHER SPECIAL PROGRAMS																											
PROGRAM OR DEPARTMENT																											
JUNIOR																											
SENIOR																											
GRADUATE																											
TOTAL MAJOR																											
PROGRAM OR DEPARTMENT																											
JUNIOR																											
SENIOR																											
GRADUATE																											
TOTAL MAJOR																											
PROGRAM OR DEPARTMENT																											
JUNIOR																											
SENIOR																											
GRADUATE																											
TOTAL MAJOR																											
CONTINUE WITH OTHER PROGRAMS																											

FORM A-102

_____ COLLEGE

RECRUITING MASTER PLAN

FALL SEMESTER 19_____

DATA REGARDING INSTITUTIONS SELECTED FOR RECRUITING VISITS							RECRUITING PLAN			
INSTITUTION NAME AND LOCATION / GROUP INSTITUTIONS BY LOCATION	H.S. or J.C.	Estimated Size of Graduating Class	Position or Person to be Contacted	NUMBER: Applicants Last 4 yrs.	NUMBER: Students Currently Enrolled	Academic Standing of Current Enrollment: Superior/Avg./Poor	Planned Date of Visit	Interviewer Recommended	Number Applicants Anticipated	COMMENTS

FORM A-103

_____ COLLEGE

RECRUITING VISITS RESULT – MASTER SCHEDULE

FALL SEMESTER 19____

INSTITUTIONS TO BE VISITED		RECRUITING PLAN		RECRUITING VISIT RESULTS							COMPLETED APPLICATIONS EXPECTED			
							NUMBER OF				APPLICANTS			HOUSING
NAME AND LOCATION	H.S. or J.C.	Date of Visit	No. of Appl. Anticip.	Date of Visit	Type Visit (College Night) (Special)	Number Students	Appl Dist.	Pers Intv	Tent Adm	F/A Req.	Freshmen	Transfer	Special Programs	On Campus Housing

FORM A-104

_____

(College Name)

Sub-System II. Implementation of Recruiting Plan

Action	Performed by
Distribute Recruiting Master Plan (Form A-103) to Interviewers.	Admissions Director
Review Recruiting Master Plan with Interviewers and adjust for conflicts.	Admissions Director
Revise Recruiting Master Plan.	Admissions Director
Schedule and co-sponsor Orientation Meeting for all Interviewers. Distribute, explain, and answer questions about: 1. Admissions Operating Policies (Form A-101) 2. Admissions Plan (Form A-102) 3. Recruiting Master Plan (Form A-103) 4. Recruiting Visit Master Schedule (Form A-104) 5. Visitation History Card (Form A-201) 6. Interviewer's Visitation Report (Form A-202) 7. Candidate Interview Report (Form A-203) 8. Admissions Status Report (Form A-204) 9. Admissions Application Forms A-205, 06, 07,10 11, 12, and 13. 10. Form letter requesting date and space for recruiting visits (Form A-212).	Admissions Director and Financial Aid Director

(College Name)

Sub-System II. Implementation of Recruiting Plan (Cont'd)

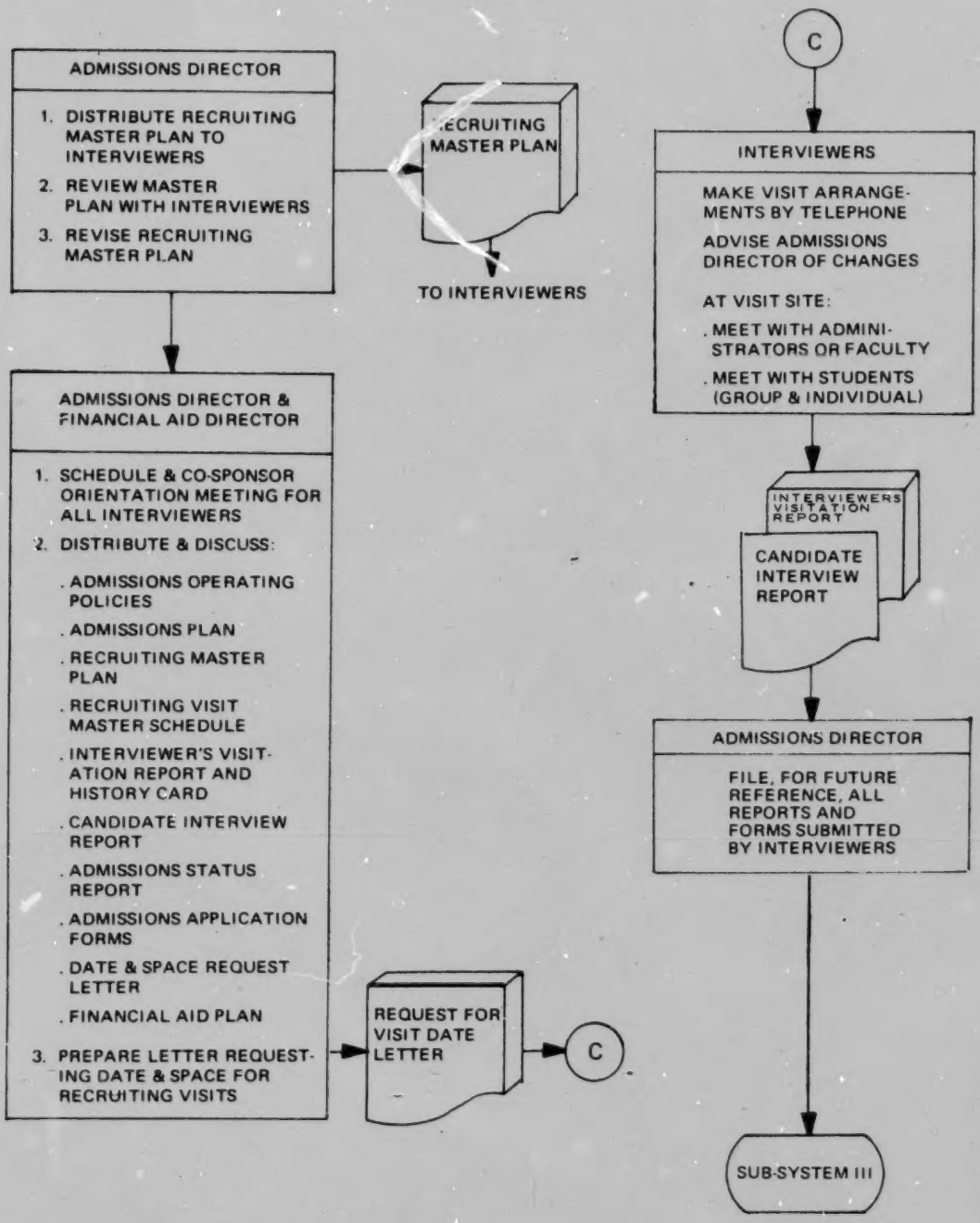
Action	Performed by
11. Financial Aid Plan portion of orientation program covered in Financial Aid System - Forms FA-101, 102, 103, 201 and 202.	
Prepare letter (for Interviewer's signature) requesting dates for recruiting visits at each school on Recruiting Master Plan (Form A-212).	Admissions Director
Review visitation history card for schools to be visited.	Interviewer
Sign and mail letters, obtain responses from schools by telephone and make final arrangements. Advise Admissions Director of any change in dates or other problems.	Interviewer
Secondary School and Junior College Visits: 1. Meet with Guidance Counselor, Placement Counselor or Department Chairman, if possible. 2. Meet with students in groups and individually. 3. Complete Candidate Interview Report (Form A- 203) 4. Distribute application materials.	Interviewer
Receive Interviewer's Visitation Report (Form A- 202) and Candidate Interview Report after each school visit.	Admissions Director

_____
(College Name)

Sub-System II. Implementation of Recruiting Plan (Cont'd)

Action	Performed by
File alphabetically Candidate Interview Reports for future reference when applications are received.	

SUB-SYSTEM II. Implementation of Recruiting Plan


ADMISSIONS DIRECTOR
1. DISTRIBUTE RECRUITING MASTER PLAN TO INTERVIEWERS
2. REVIEW MASTER PLAN WITH INTERVIEWERS
3. REVISE RECRUITING MASTER PLAN
RECRUITING MASTER PLAN
TO INTERVIEWERS
C
INTERVIEWERS
MAKE VISIT ARRANGEMENTS BY TELEPHONE
ADVISE ADMISSIONS DIRECTOR OF CHANGES
AT VISIT SITE:
. MEET WITH ADMINISTRATORS OR FACULTY
. MEET WITH STUDENTS (GROUP & INDIVIDUAL)
INTERVIEWERS VISITATION REPORT
CANDIDATE INTERVIEW REPORT
ADMISSIONS DIRECTOR
FILE, FOR FUTURE REFERENCE, ALL REPORTS AND FORMS SUBMITTED BY INTERVIEWERS
SUB-SYSTEM III
ADMISSIONS DIRECTOR & FINANCIAL AID DIRECTOR
1. SCHEDULE & CO-SPONSOR ORIENTATION MEETING FOR ALL INTERVIEWERS
2. DISTRIBUTE & DISCUSS:
. ADMISSIONS OPERATING POLICIES
. ADMISSIONS PLAN
. RECRUITING MASTER PLAN
. RECRUITING VISIT MASTER SCHEDULE
. INTERVIEWER'S VISITATION REPORT AND HISTORY CARD
. CANDIDATE INTERVIEW REPORT
. ADMISSIONS STATUS REPORT
. ADMISSIONS APPLICATION FORMS
. DATE & SPACE REQUEST LETTER
. FINANCIAL AID PLAN
3. PREPARE LETTER REQUESTING DATE & SPACE FOR RECRUITING VISITS
REQUEST FOR VISIT DATE LETTER
C

VISITATION HISTORY CARD

HIGH SCHOOL, PREP SCHOOL, OR COLLEGE NAME

COUNTY

STATE

SCHOOL ADDRESS:

NAME OF COUNSELOR OR CONTACT:

TITLE:

TELEPHONE NO.:

APPROXIMATE ENROLLMENT

AVE GRADUATING CLASS

YEAR	DATE OF VISIT	INTERVIEWER	TYPE OF VISIT	NUMBER OF					
				Students Present	Personal Interviews	Tentative Admiss.	F/A Req.	Applications Expected	Applications Rec'd.

STUDENTS ENROLLED

19__ ____ 19__ ____ 19__ ____ 19__ ____ 19__ ____

_____ COLLEGE

INTERVIEWER'S VISITATION REPORT

NAME OF INSTITUTION		NUMBER OF STUDENTS	PRESENT AT OCCASIONS
ADDRESS			INDIVIDUAL INTERVIEWS
NAME OF CONTACT			TENTATIVE ADMISSION OFFERS FRESHMEN: TRANSFER: SPECIAL:
TYPE/POSITION OF CONTACT			
TYPE OF VISIT			INTERESTED IN LIVING ON CAMPUS

CANDIDATE INTERVIEW REPORTS ATTACHED		NUMBER OF	
1	6		LETTERS OF INQUIRY DISTRIBUTED
2	7		ADMISSIONS APPLICATION PACKAGES DISTRIBUTED
3	8		
4	9		APPLICATIONS EXPECTED TO BE RETURNED
5	10		

FOR INTERVIEWERS: WOULD YOU RECOMMEND VISITING THIS INSTITUTION AGAIN NEXT YEAR? ____ YES ____ NO WHY?_____

OTHER COMMENTS _____

UNUSUAL QUESTIONS AND COMMENTS FROM STUDENTS _____

NAME OF INTERVIEWER		DATE	

FORM A 202

FORM A-203

_____ COLLEGE
CANDIDATE INTERVIEW REPORT FORM

CANDIDATE INTERVIEWER REPORT: ___/___/___ date FRESHMAN ☐ TRANSFER ☐

NAME_____ PROBABLE MAJOR_____ CAMPUS HOUSING_____

HOME ADDRESS: ST._____ CITY_____ STATE & ZIP_____

SCHOOL_____ LOCATION_____ DATES:_____ TO_____

ACADEMIC BACKGROUND

ACADEMIC DIPLOMA ☐
COMMERCIAL " ☐
TECHNICAL " ☐
VOCATIONAL " ☐

CLASS RANK_____ GRADE AVERAGE_____

SAT SCORES		ACT SCORES					ACHIEVEMENT TEST SCORES			
Verbal	Math									

TENTATIVE ADMIT OFFER_____ FINANCIAL AID REQUIRED_____

INTERVIEWER'S COMMENTS:_____

_____

_____

DESIRABLE CANDIDATE: YES_____ NO_____ UNDECIDED_____

DATE OF INTERVIEW_____ INTERVIEWER_____

FORM SIZE 5" x 7"

FORM A-204

_____ COLLEGE

COMPARATIVE ADMISSIONS STATUS REPORT FORM

COMPARATIVE ADMISSIONS STATUS REPORT

DATE ___/___/___

FRESHMAN ☐ TRANSFER ☐ SPECIAL STUDENTS ☐

	LAST YEAR THIS DATE					CURRENT YEAR				
		MALE		FEMALE			MALE		FEMALE	
CATEGORY	TOTAL	COMM	RES	COMM	RES	TOTAL	COMM	RES	COMM	RES
PLANNED ADMISSIONS										
ENROLLMENT OBJECTIVES										
TENTATIVE OFFERS										
APPLICATIONS RECEIVED										
OFFERS OF ADMISSION										
DEPOSITS PAID										
PROBABLE ENROLLMENT										

ADMISSIONS STATUS REPORT (BY PROGRAM)

PROGRAM	PLANNED ADMISSIONS	ENROLLMENT OBJECTIVES	TENTATIVE OFFERS	APPLICATIONS RECEIVED	OFFERS OF ADMISSIONS	DEPOSITS PAID	PROBABLE ENROLLMENT
TOTAL							

FORM A-205

_____ College

APPLICATION FOR ADMISSION (UNDERGRADUATE)

Date you wish to enter (Circle One) Fall 19___ Spring 19 ___ Summer 19 ___

Deadlines for Receipt of Application: Fall (Mo/Day) Spring (Mo/Day) Summer (Mo/Day)

1. _____
   Last Name (Print) First Name Middle Name

2. Social Security No. ___ - __ - ____ Age _____ Sex _____

3. Home Address (Permanent mailing address) _____
   Number and Street

   _____ _____ _____
   City State Zip Telephone

4. Birthdate _____ Birthplace _____ _____
   Mo. Day Year City State

5. Class you wish to enter: Fresh.☐ Soph.☐ Jr.☐ Sr.☐ Do you plan to attend: Full-Time ☐ Part-Time ☐

   What is your intended field of study? _____

6.

Family Data	☐ Father or ☐ Guardian	☐ Mother (Maiden Name) ☐ Guardian	☐ Husband ☐ Wife (If Married)
Full Name (If deceased, write deceased after name)			
Occupation			
Present Mailing Address			

7. School Data — List all schools & colleges you have attended, in chronological order, beginning with present school. If veteran include military service and dates.

Date of Attendance From To	Name & Location of School (If Veteran-Specify Branch)	Diploma, Degree or Type of Discharge

8. Have you taken ACT test? Yes ___ No ___ SAT test? Yes ___ No ___
   If Yes, specify Date of Test _____. If No, specify the Test (ACT/SAT-Circle One) and date you plan to take it _____.
9. Do you plan to live on campus? Yes _____ No _____
10. Do you have any physical condition which requires special arrangement? Yes _____ No _____
    If Yes, explain _____
11. Please indicate name and relationship of any close relative who has attended _____ College. Include dates and degree attained _____.
12. Have you ever been dismissed from a college for academic/disciplinary reason?
    Yes _____ No _____ If Yes, explain _____.
13. If you are a transfer student, specify reasons for transfer _____

14. Please state in your own handwriting your reasons for applying to _____ College, and your future plans. If you have been out of school for more than three months, please list chronologically your activities or jobs held during that time.

The undersigned agrees that the information furnished on this Application is complete and correct, and that any deliberate omission or falsification of information may result in denial of admission or dismissal.

Signature of Applicant _____ Date _____

Parents' or Guardians' Signature: (If Applicant is under 21 years of age.)

_____ Date _____
Father/Guardian

_____ Date _____
Mother/Guardian

_____College

A. GENERAL INSTRUCTIONS FOR ALL APPLICANTS

To make application for admission to _____College, each applicant must accomplish the following steps:

1. Complete and return as soon as possible.

   (a) Application Form
   (b) School Location Card

   INCOMPLETE OR UNSIGNED APPLICATIONS WILL BE RETURNED TO THE APPLICANT.

2. Enclose with your application fee payment of $_____ and your Application Fee Receipt Form. NO APPLICATION WILL BE PROCESSED UNTIL THIS FEE IS RECEIVED.

3. Apply for a social security number if you do not already have one.

4. Register immediately with the (CEEB or ACTS) for your entrance examination, if you have not already done so and request that your scores be sent to _____College.

5. Submit the Student Description Form to a teacher of your choice, and submit the Secondary School Form to your Principal or Guidance Counselor. Urge these persons to forward the completed reports to _____ College as soon as possible.

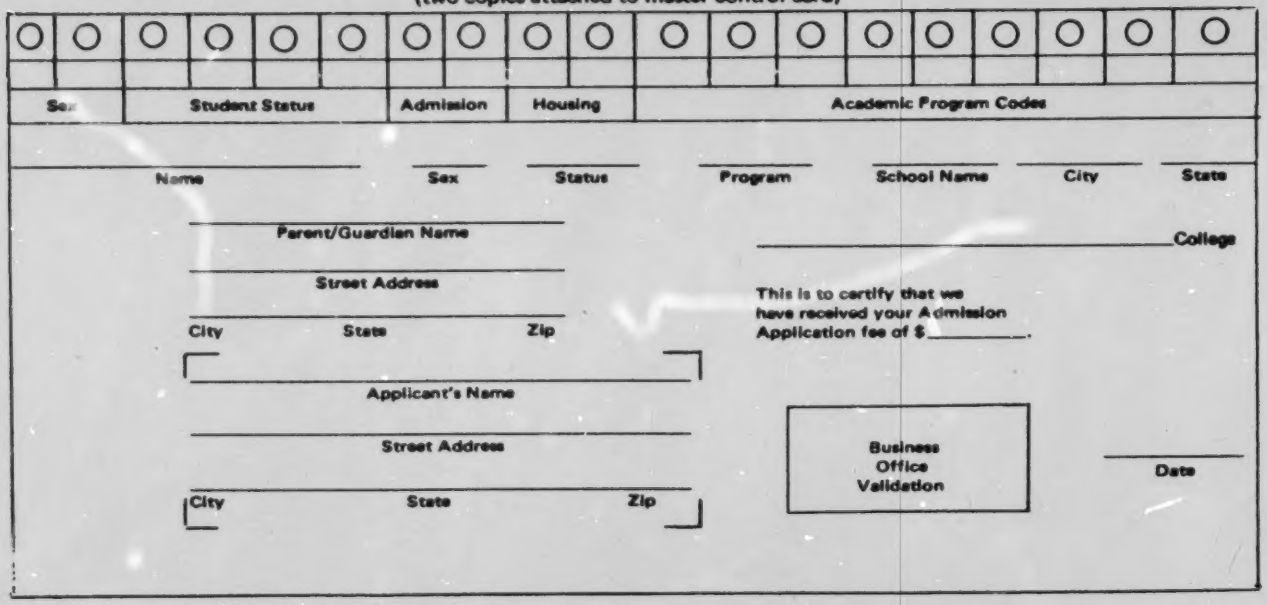
6. Request through your counselor that your school submit a transcript of your grades to _____College as soon as possible. Also request that your Final Transcript be submitted when your final grades are determined.

   If you are applying for financial aid, complete and return the enclosed financial aid application card.

APPLICATION FEE RECEIPT FORM

FORM A-207

(two copies attached to master control card)



Note: The positioning of name and address information and the form size is identical for Forms A-207 and 208. Therefore, name and address can be typed just once if carbon are placed between forms. Actually each form can be an attached part of one multiple part snap set, with the master control card (heavy weight paper) being the last form of the set.

FEE RECEIPT (1st COPY)
MASTER CONTROL CARD

FORM SIZE 3 3/8" x 7¼"

APPLICATION MASTER CONTROL CARD

FORM A-208

(The last form of a multiple part snap set which includes the Application Fee Receipt as the first two copies)

○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
M	F	FR	TR	...	SP	Offer	Accept	Campus	Paid	Math	Hist	Educ	...	...	...	...	...	Other
Sex		Student Status				Admission		Housing		Academic Program Codes								

Name _____ Sex _____ Status _____ Program _____ School Name _____ City _____ State _____

Parent/Guardian Name _____

Street Address _____

City _____ State _____ Zip _____

Applicant's Name _____

Street Address _____

City _____ State _____ Zip _____

This card is designed to be applicable to key sort techniques.
Codes should be typed in these boxes and appropriate key sort holes subsequently punched depending on the code. For example, if on-campus housing is requested a "C" may be typed in the box containing "Campus".

FORM SIZE 3 3/8" x 7¼"

_____College
Application Material Request Card

Please send me application material required for:
Admission as a Freshman_____ Transfer Student_____
Check if you desire a financial aid application ☐
Mailing Address

Print Clearly-Name:_____
Street Address_____
City:_____ State:_____ Zip:_____

Please specify name and address of present school/college.

_____

_____

(Back)

Admissions Director
_____College
Street Address
City, State, Zip Code

(Front)

Form Size-Post Card Stock

SECONDARY-SCHOOL RECORD—TRANSCRIPT

Form A-210

STUDENT INFORMATION

Last Name | First Name | Middle Name

Home Address

Parent or Guardian

Previous Secondary School Attended (if any) | Date Left

Date of Birth | Sex | ☐ Withdrew ☐ Was or Will Be Graduated | Month | Year

SCHOOL INFORMATION

School Name

School Address

School Accredited By ☐ State System ☐ Reg. Accred. Assoc. | School Phone Number

☐ PUBLIC ☐ NON-PUBLIC | Enrollment in Grades —12 | Percent Graduates Entering College: 4 Yr. Col. | 2 Yr. Col. and Other

Passing Mark | Honors Mark (if any) | LOWEST NUMERICAL EQUIVALENT: A | B | C | D

CLASS RECORD

Include Subjects Failed or Repeated

YEAR	SUBJECTS	IDENTIFY LAB TV SEMINAR SUMMER	IDENTIFY HONORS ACCEL AD. PL. ETC.	MARKS 1ST. SEM.	MARKS FINAL OR 2ND. SEM	CRED OR UNIT	STATE EXAM. SCORES
9							
19___							
19___							
10							
19___							
19___							
11							
19___							
19___							
12							
19___							
19___							

EXPLANATION OF HONORS COURSES

RANK IN CLASS

BASED ON_____SEMESTERS

☐ EXACTLY ☐ APPROX. _____ IN CLASS OF _____

FINAL RANK _____

Check Appropriate Rank Information

☐ ALL SUBJECTS GIVEN CREDIT ☐ ALL STUDENTS

☐ MAJOR SUBJECTS ONLY ☐ COLL. PREP. STUDENTS ONLY

Explain Weighting of Marks in Determining Rank

OUTSTANDING ACTIVITIES, HONORS, AWARDS

RECORD OF STANDARDIZED TESTS

DATE	NAME OF TEST	RAW OR STD. SCORE	PERCENTILE SCORE	NORM GROUP	DATE	NAME OF TEST	RAW OR STD. SCORE	PERCENTILE SCORE	NORM GROUP

Date | Signature | Title

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Form A-211

SECONDARY-SCHOOL RECORD—STUDENT DESCRIPTION SUMMARY

Last Name	*First Name*	*Middle Name*	*School*	*State*

SUMMARY OF DESCRIPTIVE SCALES

SUMMARIZED BELOW ARE THE DESCRIPTIONS MADE BY TEACHERS OF GRADE(S) *(specify number at each level)* ☐ 10 ☐ 11 ☐ 12

(1) PARTICIPATION IN DISCUSSION (SELF-INITIATED)
- _____ always involved, often initiates discussion
- _____ usually participates
- _____ often participates
- _____ occasionally participates
- _____ seldom participates
- _____ not applicable

(2) INVOLVEMENT IN CLASSROOM ACTIVITIES
- _____ very high in all activities
- _____ active, usually shows genuine interest
- _____ mild, politely attentive
- _____ languid, attention often wanders
- _____ distracted, does other things during class
- _____ vacillates greatly

(3) PURSUIT OF INDEPENDENT STUDY
- _____ considerable study and major project(s)
- _____ considerable study or major project(s)
- _____ some study and minor project(s)
- _____ some study or minor project(s)
- _____ no evidence of independent study
- _____ not applicable

(4) EVENNESS OF PERFORMANCE
- _____ exceptionally consistent
- _____ even, varies no more than one mark
- _____ slightly uneven, often varies one mark
- _____ uneven, often varies two marks
- _____ erratic, performance fluctuates greatly

(5) CRITICAL AND QUESTIONING ATTITUDE
- _____ often challenges
- _____ sometimes challenges
- _____ occasionally is skeptical
- _____ sometimes probes
- _____ rarely questions
- _____ not applicable

(6) DEPTH OF UNDERSTANDING
- _____ excellent insight
- _____ good understanding
- _____ some insight
- _____ little insight
- _____ poor understanding
- _____ not applicable

(7) PERSONAL RESPONSIBILITY
- _____ always accepts fully
- _____ usually accepts fully
- _____ partially accepts
- _____ sometimes refuses
- _____ often refuses

(8) CONSIDERATION FOR OTHERS
- _____ always considerate of others' rights and feelings
- _____ usually considerate
- _____ courteous, little evidence of consideration
- _____ sometimes inconsiderate
- _____ often inconsiderate
- _____ inadequate opportunity to observe

COMMENTS

HEALTH DO YOU KNOW OF ANY HEALTH FACTORS (PHYSICAL OR EMOTIONAL) OF WHICH THIS COLLEGE SHOULD BE AWARE IF THIS STUDENT MATRICULATES?
☐ NO ☐ YES *(Please Explain on Separate Sheet)*

RECOMMENDATION TO COLLEGE *If school policy precludes any recommendation, please check here* ☐

Date	*Signature*	*Title*

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_____

_____College

We at _____College are interested in meeting with any of your students who might consider applying for admission to college. I would like to arrange a group meeting and personal interviews with prospective applicants at your convenience during the week of _____. The group meeting should take an hour or less and the interviews 15-20 minutes each. If you are interested, please determine the date which would be most convenient for you, and I will telephone you, within a week, regarding the final arrangements.

Thank you so much for your cooperation.

_____
Signature of Interviewer

Note:

If appropriate add a paragraph that provides information about current _____College students that graduated from the high school in question.

For example:

Presently (number) of your former students are enrolled at _____ College and (number) have maintained appropriate levels of academic achievement In addition, (number) are receiving some form of financial aid/have been award ' academic honors/are officers in college student groups.

Our experience with your high school has been pleasant, and we are hopeful that the association will continue.

_____College
Transfer Candidate Evaluation

Male____ Female_____
(Please Check One)

Name of Candidate.....
(Please print or type) Last First Middle

Candidate's Address.....
Street City State Zip Code

Present College.....
Name Street City State Zip Code

To the Candidate: After you have filled in the three lines above, give this form to your Dean, Placement Officer or a Faculty Member.

To the Dean, Placement Officer, or Faculty Member:
This student is applying for admission to_____College in 19____. A full and candid report from his present college is essential. We therefore ask for careful ratings of and comments about his character and ability by a college official who knows him well. All information furnished will be treated as strictly confidential.

Deadlines: Please file this report as soon as possible after you receive it.

Rank in Class: If possible, include in your report a statement of the candidate's rank in class and how it is determined.

The Transcript: A transcript of his record to date is also required. Please do not delay submission of his transcript until the next set of grades is available. If the applicant is accepted for admission, a final transcript and certification of graduation will be requested. The transcript should provide at least the following information:

a. Courses taken, year taken, and grades.
b. Courses failed or repeated.
c. Courses currently in progress.
d. Indication of honors, accelerated courses, and Advanced Placement courses or sections.
e. A brief explanation of your grading system.
f. Numerical rank in class. (Please explain which course grades, which college semesters, and what course weighting -- if any -- are considered in the computation of class rank).

Mailing Instructions: Please return the completed form to Office of Admissions, _____College, (street), (city), (state), (zip).

Thank you for your help.

_____
Admissions Director

A. Intellectual Ability and Achievements

1. How would you rate the candidate as to academic ability and motivation? (Circle appropriate number)

	Poor	Below Average	Average	Above Average	Excellent
Ability:	1	3	5	7	9
Motivation:	1	3	5	7	9

2. How well does the candidate express himself in: (Circle appropriate number)

(a) Writing?	1	3	5	7	9
(b) Speech?	1	3	5	7	9

3. This candidate ranks (__ exactly) _____ from the top, in his class.
(__ approximately)

numbering _____ students. This rank covered the period from __(month, year)__ when he entered this school to __(month, year)__, the most recent marking period.

(If precise rank is not available, please indicate approximate rank to the nearest tenth from the top: _____).

4. Was his record with you a true index of his ability, or did outside circumstances interfere with his academic achievement? (For example: illness, excessive involvement in extracurricular activities, term-time employment; difficult home situation, an overshadowing brother or sister, etc.) If not a true index, please explain in the "Summary and Recommendation" on the next page.

B. Character and Personality

1. In making the following ratings, please keep in mind that they will be used to compare this student with other students. Please make them as realistically as you can in comparison with your college preparatory students. We recognize that you may not be able to rate with the precision implied by "top 2 or 3 per cent;" the figures are rough guides only. (Circle appropriate number).

	*	Poor	Below Average	Average	Good	Excellent		
a.	0	1	3	5	7	9	Energy	a.
b.	0	1	3	5	7	9	Independence	b.
c.	0	1	3	5	7	9	Originality	c.
d.	0	1	3	5	7	9	Leadership	d.
e.	0	1	3	5	7	9	Self-confidence	e.
f.	0	1	3	5	7	9	Warmth of Personality	f.
g.	0	1	3	5	7	9	Sense of Humor	g.
h.	0	1	3	5	7	9	Concern for Others	h.
i.	0	1	3	5	7	9	Reaction to Criticism	i.
j.	0	1	3	5	7	9	Honesty	j.
k.	0	1	3	5	7	9	Respect Accorded by Classmates	k.
l.	0	1	3	5	7	9	Respect Accorded by Faculty	l.

* No basis for Judgement.

2. Has the candidate experienced any apparent physical or emotional disability which affected his performance in school or is likely to do so in college? (If so, please explain fully under "Summary and Recommendation." Yes _____ No_____

C. Summary and Recommendation

1. Please write a brief summary appraisal of the candidate, assessing his personal and academic qualities and his promise as a college student. If he is accepted, your description of him becomes a part of his permanent confidential college file and will help us in advising him. Please feel free to insert an additional sheet or to write a separate letter if the space below seems inadequate.

2. I recommend this candidate for admission to _____College.

	not recommended	Without enthusiasm	fairly strongly	strongly	enthusiastically
for academic promise:	1	3	5	7	9
for character and personal promise:	1	3	5	7	9
Overall recommendation	1	3	5	7	9

Signed _____Length of time acquainted with candidate_____

Please Print Name _____Position_____Date _____

School_____
(name) (city) (state)

_____
(College Name)

Sub-System III. Processing of Inquiries and Applications

Action	Performed by
Receive Financial Aid Application material from Financial Aid Office.	Admissions Director
Respond to inquiries and requests by mailing appropriate materials to applicants: 1. Letter (Form A-301) with enclosed card (Form A-210) to request application. 2. Application Materials - Forms A-205, 06, 07, 09, 11 & 12. 3. Financial Aid Application Material - Forms FA-201 and 2.	Admissions Director
Date stamp admissions applications upon their receipt from applicants.	Admissions Director
Prepare Application Master Control Card (Form A-208) and Applicant File Folder (Form A-302) for all applications received.	Admissions Director
Post receipt of application and file alphabetically in Application Master Control File.	
Determine whether application for admission is complete, application fee is enclosed and if all required forms have been included in material returned.	Admissions Director

_____
(College Name)

Sub-System III. Processing of Inquiries and Applications (Cont'd)

Action	Performed by
If application is complete but applicant failed to remit required application fee	
1. Send to applicant, Receipt Application Letter (Form A-304) and letter noting that fee was omitted (Form A-305).	Admissions Director
2. Place Applicant Folder in "Awaiting Application or Application Fee" Bin.	Admissions Director
If applicant remitted required application fee but submitted an incomplete or unsigned admissions application.	
1. Transmit application fee with completed Application Fee Receipt Form to Business Office.	Admissions Director
2. Return admissions application to Applicant with letter noting omissions (Form A-305).	Admissions Director
3. Place Applicant Folder in "Awaiting Application or Application Fee" Bin.	Admissions Director
If application is incomplete and applicant failed to remit required application fee	
1. Return admission application to applicant with letter noting omissions (Form A-305).	Admissions Director

_____
(College Name)

Sub-System III. Processing of Inquiries and Applications (Cont'd)

Action	Performed by
2. Place Applicant File Folder in "Awaiting Application or Application Fee Bin."	Admissions Director
COMPLETE	
If application is complete and application fee was remitted.	Admissions Director
1. Post Application Master Control Card for receipt of completed application.	Admissions Director
2. Transmit Application Fee and Application Fee Receipt forms to Business Office.	Admissions Director
3. Send Notification of Receipt of Properly Completed Application (Form A-304) to applicant.	Admissions Director
4. File Applicant Folder in "Application complete Bin."	Admissions Director
Periodically send Follow-up Letter (Form A-306) to applicants to whom application has been returned for correction or who failed to remit required application fee.	Admissions Director
Receive corrected applications and/or required application fees.	Admissions Director
1. Transmit application fee to Business Office with completed copy of Application Fee Receipt Form.	Admissions Director

_____
(College Name)

Sub-System III. Processing of Inquiries and Applications (Cont'd)

Action	Performed by
2. Post Application Master Control Card.	Admissions Director
3. Send applicant Notification of Receipt of Properly Completed Application Post Card (Form A-304).	Admissions Director
4. Transfer Applicant Folder to "Application complete" Bin.	Admissions Director
Receive student description forms, Secondary School Records, Transfer Candidate Evaluations and Transcripts. File data in Applicant's File Folders.	Admissions Director
Periodically review "Awaiting Application or Application Fee" Bin to determine applicants for whom requested material has not been received. Send applicant follow-up letter (Form A-307).	Admissions Director
Receive Scholastic Aptitude Test (SAT) or American College Testing (ACT) scores. File data in Applicant's File Folder.	Admissions Director
When applicant's folder is complete, transfer applicant's folder to "Folder Now Complete" Bin.	Admissions Director

_____
(College Name)

Sub-System III. Processing of Inquiries and Applications (Cont'd)

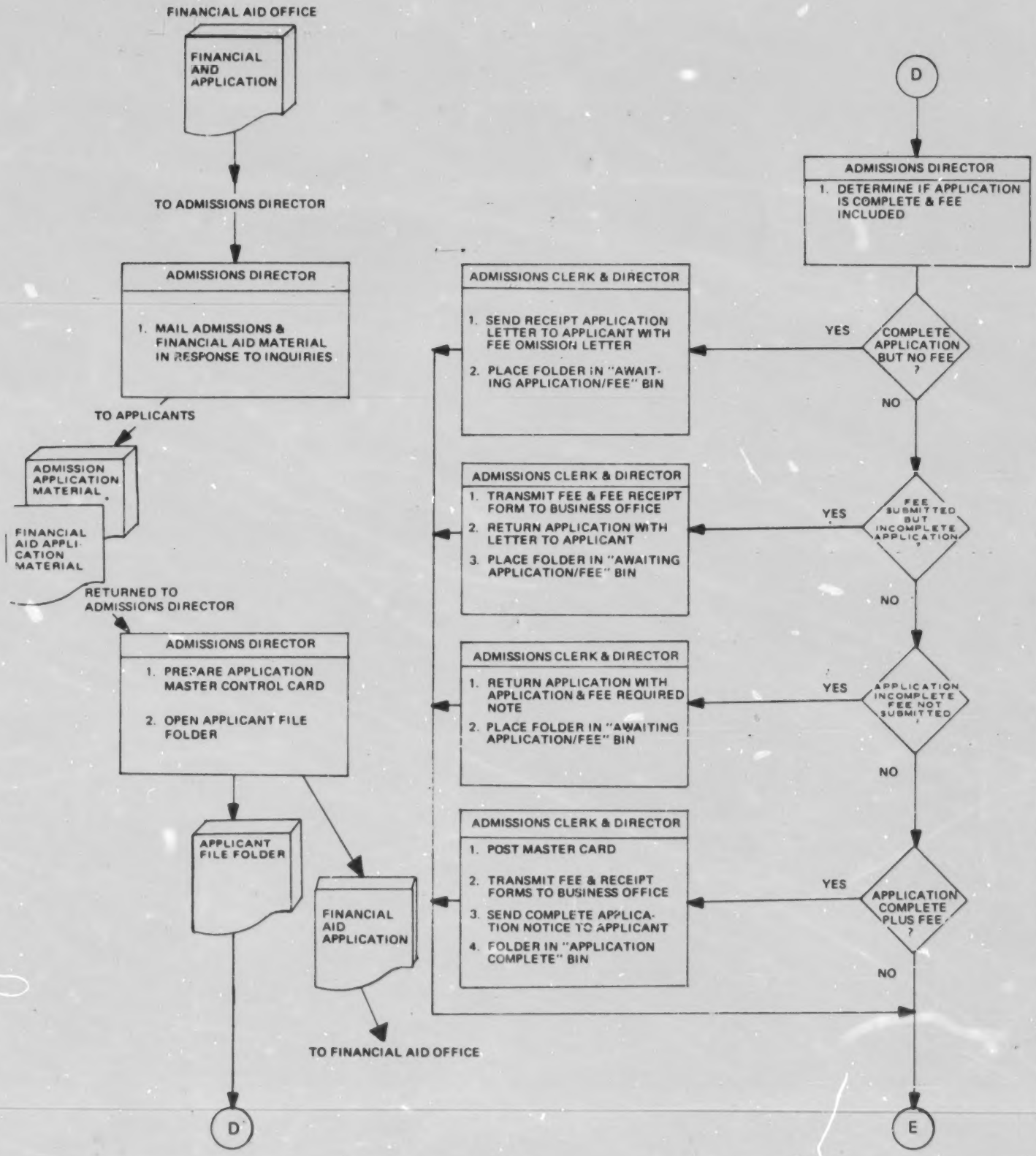
Action	Performed by
Check applicant's folder to be sure items in proper sequence. Recommended sequence: 1. Admissions Application 2. Secondary School Record (Freshmen only) 3. Student Description Form 4. High School Transcript 5. College report (transfers only) 6. College transcript to date (transfers only) 7. Candidate Interview Report 8. General correspondence *Note: The organization of file folders is important because of subsequent use of folder materials for statistical analyses of the admissions plan and its effectiveness. An efficient and orderly arrangement will facilitate data gathering.	Admissions Director
Periodically during admission period, prepare and distribute Admissions Status Report (Form A-204) Recommended distribution: 1. President 2. Academic Dean 3. Dean of Students	Admissions Director

_____
(College Name)

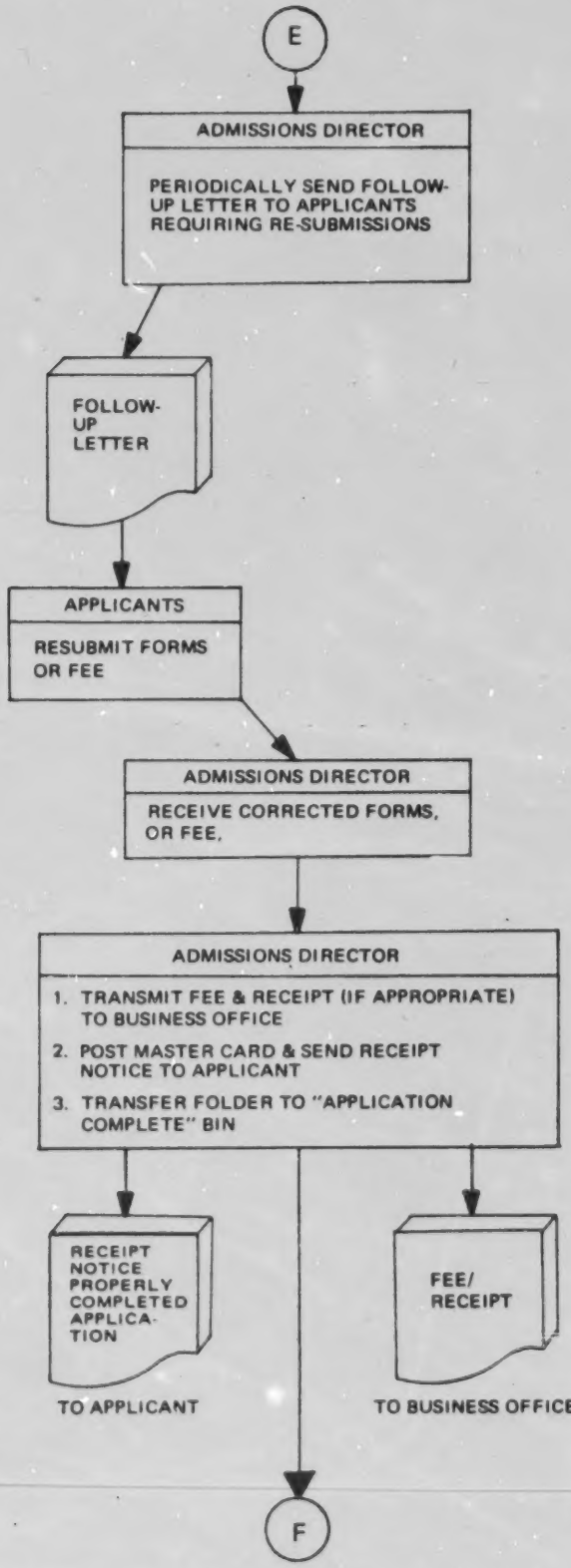
Sub-System III. Processing of Inquiries and Applications (Cont'd)

Action	Performed by
4. Business Manager	
5. Registrar	
6. Financial Aid Director	
7. Admissions Committee	

SUB-SYSTEM III. Processing of Inquiries and Applications


FINANCIAL AID OFFICE
FINANCIAL AND APPLICATION
TO ADMISSIONS DIRECTOR
ADMISSIONS DIRECTOR
1. MAIL ADMISSIONS & FINANCIAL AID MATERIAL IN RESPONSE TO INQUIRIES
TO APPLICANTS
ADMISSION APPLICATION MATERIAL
FINANCIAL AID APPLICATION MATERIAL
RETURNED TO ADMISSIONS DIRECTOR
ADMISSIONS DIRECTOR
1. PREPARE APPLICATION MASTER CONTROL CARD
2. OPEN APPLICANT FILE FOLDER
APPLICANT FILE FOLDER
FINANCIAL AID APPLICATION
TO FINANCIAL AID OFFICE
D
D
ADMISSIONS DIRECTOR
1. DETERMINE IF APPLICATION IS COMPLETE & FEE INCLUDED
COMPLETE APPLICATION BUT NO FEE ?
YES
ADMISSIONS CLERK & DIRECTOR
1. SEND RECEIPT APPLICATION LETTER TO APPLICANT WITH FEE OMISSION LETTER
2. PLACE FOLDER IN "AWAITING APPLICATION/FEE" BIN
NO
FEE SUBMITTED BUT INCOMPLETE APPLICATION
YES
ADMISSIONS CLERK & DIRECTOR
1. TRANSMIT FEE & FEE RECEIPT FORM TO BUSINESS OFFICE
2. RETURN APPLICATION WITH LETTER TO APPLICANT
3. PLACE FOLDER IN "AWAITING APPLICATION/FEE" BIN
NO
APPLICATION INCOMPLETE FEE NOT SUBMITTED
YES
ADMISSIONS CLERK & DIRECTOR
1. RETURN APPLICATION WITH APPLICATION & FEE REQUIRED NOTE
2. PLACE FOLDER IN "AWAITING APPLICATION/FEE" BIN
NO
APPLICATION COMPLETE PLUS FEE ?
YES
ADMISSIONS CLERK & DIRECTOR
1. POST MASTER CARD
2. TRANSMIT FEE & RECEIPT FORMS TO BUSINESS OFFICE
3. SEND COMPLETE APPLICATION NOTICE TO APPLICANT
4. FOLDER IN "APPLICATION COMPLETE" BIN
NO
E
E

SUB-SYSTEM III. Processing of Inquiries and Applications



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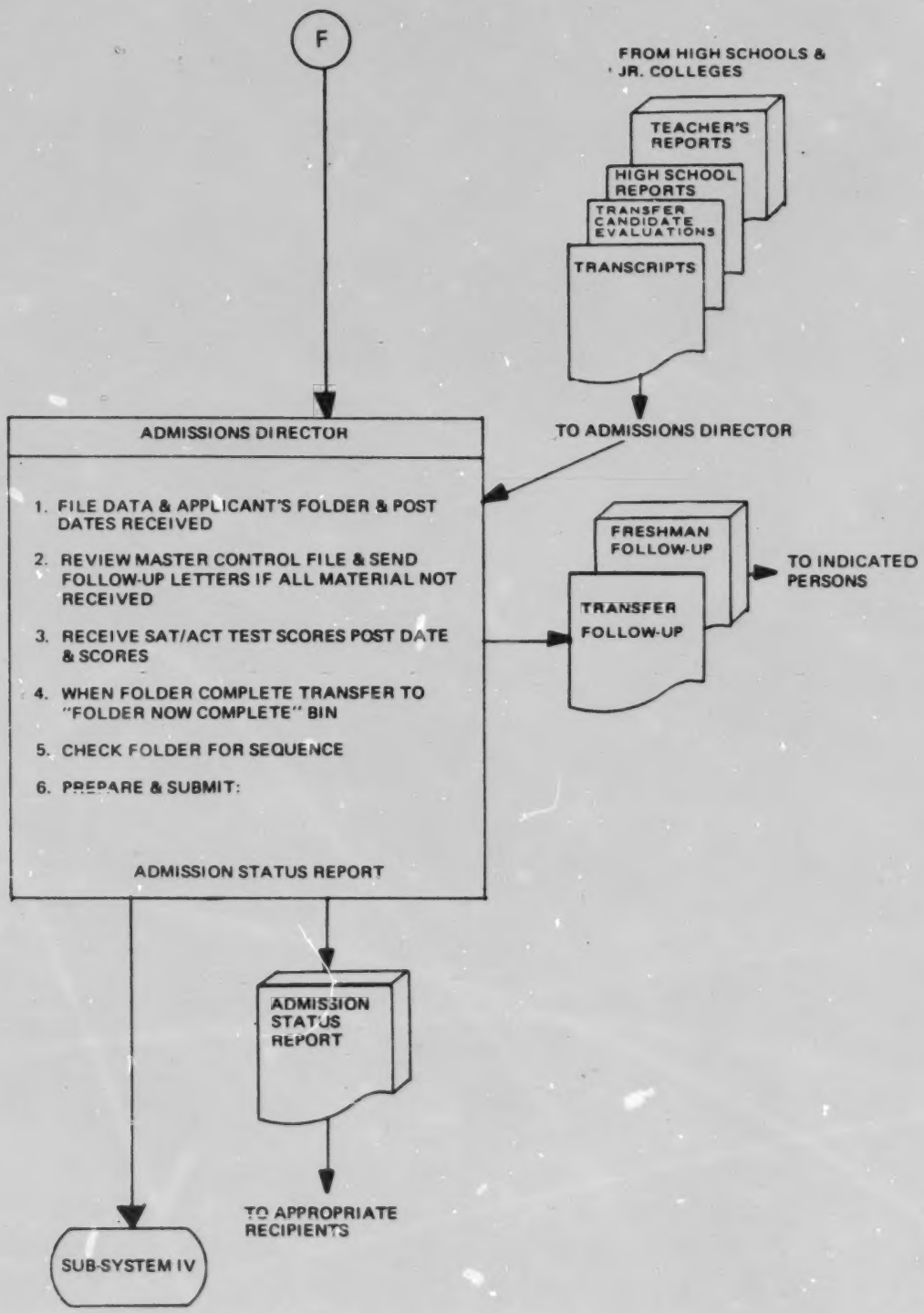
SUB-SYSTEM III Processing of Inquiries and Applications


F
FROM HIGH SCHOOLS & JR. COLLEGES
TEACHER'S REPORTS
HIGH SCHOOL REPORTS
TRANSFER CANDIDATE EVALUATIONS
TRANSCRIPTS
TO ADMISSIONS DIRECTOR
ADMISSIONS DIRECTOR
1. FILE DATA & APPLICANT'S FOLDER & POST DATES RECEIVED
2. REVIEW MASTER CONTROL FILE & SEND FOLLOW-UP LETTERS IF ALL MATERIAL NOT RECEIVED
3. RECEIVE SAT/ACT TEST SCORES POST DATE & SCORES
4. WHEN FOLDER COMPLETE TRANSFER TO "FOLDER NOW COMPLETE" BIN
5. CHECK FOLDER FOR SEQUENCE
6. PREPARE & SUBMIT:
ADMISSION STATUS REPORT
FRESHMAN FOLLOW-UP
TRANSFER FOLLOW-UP
TO INDICATED PERSONS
ADMISSION STATUS REPORT
TO APPROPRIATE RECIPIENTS
SUB-SYSTEM IV

Letter to individuals whose names are submitted by church groups, alumni, trustees, etc. (A carbon of this letter should be sent to the referring individual or organization.)

Dear

We have been informed by (individual or organization) that you are considering applying to _____College.

We at _____College believe that we can offer you a rewarding educational experience on a campus which will also provide you with the opportunity to participate in a varied program of extracurricular activities.

In case you do not have the forms necessary to apply for admission, I am enclosing the required Admissions and Financial Aid Forms which should be completed and returned as soon as possible. In addition, I am enclosing a college brochure which will provide you with further information about the academic programs and extracurricular activities at _____College.

If you wish to visit the college or if I can be of any further assistance to you, do not hesitate to contact me.

Cordially,

Director of Admissions

_____ COLLEGE

APPLICANT FILE FOLDER

LAST NAME	FIRST NAME	INITIAL	SEX	CLASS APPLYING FOR	ADMISSION TERM	MAJOR	DECISION STATUS	DATE OF: ADMIT REJECT WAIT LIST INC. INFO. REFER TO COMM.

FORM A-302

Form A-303

_____ College

_____College ____(date)____

Dear

We acknowledge receipt of your completed application for admission as a _____this (Fall/Spring). The receipt for your application fee will be mailed to you by the Business Office.

If you have not already done so, submit the Teachers Report and Secondary School Report to the appropriate person and request that they complete and return them to us as soon as possible. As soon as they are returned and we receive your College Board scores, we will be able to make an admissions decision on your application.

_____
Admissions Director

Form A-304

_____College

Dear

We were pleased to receive your application for admission to our College. In reviewing your application, however, we note that you have failed to satisfy the requirements checked below:

☐ 1. Submission of application fee ($_____).

☐ 2. Incomplete data in the following sections (incomplete application enclosed).

_____ _____

_____ _____

_____ _____

☐ 3. Proper signature lacking _____ (incomplete application enclosed).

4. Other:_____

Please submit the required documents (or fee if checked) in the enclosed self-addressed envelope. Your prompt attention to the above matters is suggested. Until we have received all necessary documents, we cannot process your application. Thank you.

Sincerely yours,

_____
Admissions Director

Form A-305

_____ College

Dear

We previously advised you that we could not process your application for admission for the reason indicated below.

☐ The application form which we returned to you was incomplete.

☐ The required application fee was not received.

The earlier you provide the above requested material the greater will be your chances of admission. If you have not already done so, we urge you to respond promptly so that we can complete the processing of your application.

Sincerely yours,

_____
Admissions Director

Form A-306

_____College

Dear

We are pleased to have received your application for admission to _____ College. However, to give proper consideration to your application, the Admissions Office must have several items of additional information. We have NOT yet received the items indicated below. Please see that these are sent to us without delay. You will be notified of our decision promptly after all items are received.

A CHECK IN A BOX MEANS THAT THE ITEM HAS NOT YET BEEN RECEIVED.

☐ SAT/ACT test score results.

Before considering your application, we require that you arrange to take this test and have the results mailed directly to us.

☐ Teacher Report.

Please remind the person to whom you submitted this report of the urgency of completing and sending this to us promptly.

☐ Secondary School Report.

Check with your guidance counselor.

☐ College Report.

The college has not yet returned our report form. Please check with them and remind them of the urgency of completing and sending this to us promptly.

☐ Transcript of secondary school grades to date. Request your high school to submit this record.

☐ Transcript and Certification of Graduation from High School. Please request that your high school submit these documents as soon as possible.

☐ College grades to date. Ask your college to mail us your grades to date now. If you are accepted as a transfer student here, we will request your final transcript from your present college later.

☐ Final transcript of college grades.

If you have any questions, please feel free to let us know. We trust you will attend to the items checked above promptly.

Sincerely yours,

_____
Admissions Director

_____
(College Name)

Sub-System IV. Admissions Decisions and Notification

Action	Performed by
REVIEW APPLICATIONS FOR ADMISSION	
Review file folders of all applicants whose folders are complete, but have yet to be offered admission.	Admissions Director
Determine whether applicants should be: 1. Offered admission 2. Rejected 3. Wait listed 4. Referred to Admissions Committee for decision	Admissions Director
Post Admission Director's decisions on: File Folder (Form A-302); Master Control Card (Form A-208); Admissions Data Card (Form A-303)	Admissions Director
Submit names and file folders of undecided cases to Admissions Committee.	Admissions Director
Review Applicant File Folders of all applicants referred to Committee.	Admissions Committee and Admissions Director
Recommend decisions for special cases referred to Committee.	Admissions Committee and Admissions Director

(College Name)

Sub-System IV. Admissions Decisions and Notification (Cont'd)

Action	Performed by
Post Committee's decisions on: 1) File Folder 2) Master Control Card	Admissions Director
NOTIFY APPLICANTS OF DECISIONS:	Admissions Director
1. Rejected:	
. Send Admission Rejection Notice (Form A-401)	
. Transfer Folder to "Reject" bin.	
. Notify Financial Aid Director of decision via copy of rejection letter.	
2. Waiting-list:	Admissions Director
. Transfer Folder to "Waiting-list" bin.	
3. Accepted:	Admissions Director
a. If applicant has <u>not</u> applied for financial aid, mail the following:	
. Admit Letter (Form A-402)	
. Statement of Degree Requirements-Transfers only (Registration Form R-203)	
. Instructions to Admitted Students (Form A-403)	
. Admission and Housing Response Card (Form A-404)	
. Tuition and Room Deposit Receipt form (Form A-405)	
. Health Form	
b. If applicant <u>has</u> applied for financial aid:	Admissions Director
. Request the following from Financial Aid Director.	

(College Name)

Sub-System IV. Admissions Decisions and Notification (Cont'd)

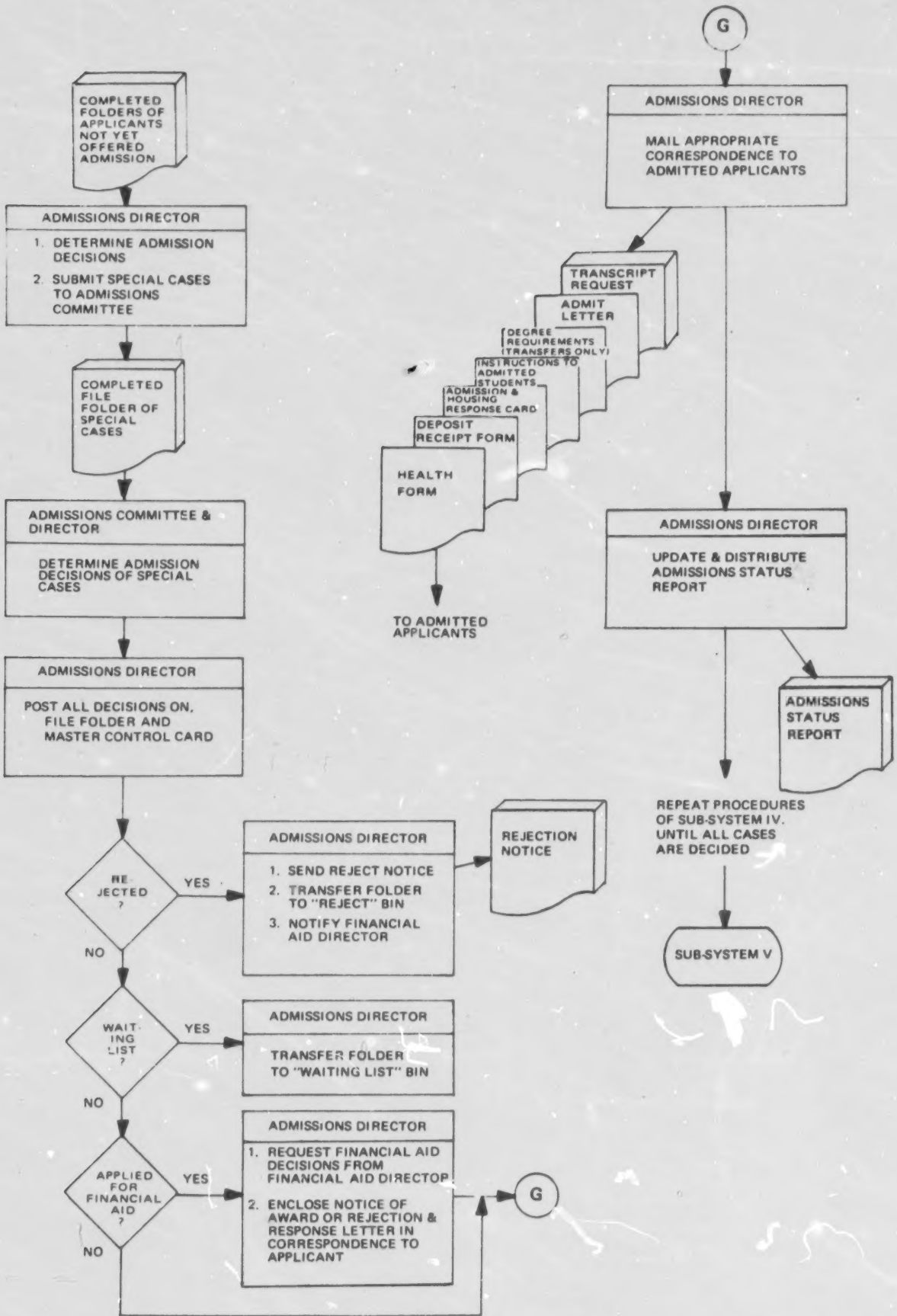
Action	Performed by
Notice of Award and Award Response Letter (Form FA-405) or Financial Aid Denial Letter (Form FA-501)	
c. Mail the following: . Financial Aid Letters (Award or Denial) . Admit Letter (Form A-402) . Statement of Degree Requirements-Transfers only (Registration Form R-203) . Instructions to Admitted Students (Form A-403) . Admission and Housing Response Cards (Form A-404) . Tuition and Room Deposit Receipt Form (Form A-405) . Health Form	Admissions Director
Update Admissions Status Report (Form A-204) for periodic distribution.	Admissions Director
Periodically repeat above procedures beginning from first step of Sub-System IV until decisions are reached for all applications. . Instructions to Admitted Students (Form A-403) . Admission and Housing Response Cards (Form A-404)	

_____
(College Name)

Sub-System IV. Admissions Decisions and Notification (Cont'd)

Action	Performed by
. Tuition and Room Deposit Receipt Form (Form A-405) . Health Form	
Update Admissions Status Report (Form A-204) for periodic distribution.	Admissions Director
Periodically repeat above procedures beginning from first step of Sub-System IV until decisions are reached for all applications.	Admissions Director

SUB-SYSTEM IV. Admissions Decisions & Notification



_____ College

Dear

I regret to inform you that, after careful consideration of your academic record and other required data, the Admissions Committee has not acted favorably on your application for admission to _____ College.

It is always with deep regret that we are forced to refuse admission to an applicant, and we hope that our decision will not discourage you from applying for admission to another institution of higher learning.

If you have any questions regarding this matter or if I can be of further help to you, do not hesitate to contact me.

Sincerely yours,

Admissions Director

Form A-402

_____ College

Dear

It is with great pleasure that I write to advise that the Admissions Committee has approved your admission to the ___(freshman/junior)_____ class entering _____College in __(month/year)__. The Admissions Committee extends congratulation on your selection, which you have earned by your academic qualifications and personal promise.

To guarantee your enrollment you should read the enclosed "Instructions for Admitted Students" and complete and return all the required forms by _____(date)_____. This will enable us to send you additional information about your first year at _____ College.

We look forward to having you on campus next semester and send our best wishes for the months ahead.

Cordially,

_____
Admissions Director

Note:

1. If applicant has applied for "on-campus housing" add following as second paragraph.

   Residential space in a campus dormitory has also been reserved for you. We are sure you will enjoy living on campus.

2. If applicant has applied for financial aid enclose financial aid award or denial letter (Forms FA-405 & FA-501).

3. If applicant is a transfer student enclose statement of degree requirements (Registration Form R-203).

_____ College

INSTRUCTIONS FOR ADMITTED STUDENTS

I. Having been accepted for admission to _____College, you must take the following steps to reserve your place in the _____ class entering in _____(month)_____ 19 ___.

(1) Complete and return, no later than _____(date)_____ 19 ___ the enclosed reply form cards. Mail the forms and a check for your deposit(s), to the Admissions Office in the envelope provided (See V below.)

(2) If you are presently in high school or college, please be sure that we receive a final transcript and certification of graduation from your school. Your admission is contingent upon satisfactory completion of the current school year.

II. If you have applied for and been awarded financial aid you should complete and return the financial aid award acceptance form with the admissions reply forms.

III. After the College receives notice of your intention to enroll, information will be mailed to you on course registration and rooming arrangements. Classes start on _____(date)_____, but you should be here on campus _____days earlier to register and make other preparations.

IV. If you do not intend to enroll in _____(month, 19)_____, please so indicate on the enclosed reply form. Mail this form, no later than ____(date)_____ in the envelope provided.

V. Payment of a $_____Tuition Deposit is required in order to hold a place for any applicant. This deposit is refundable if you notify us by_____(date)_____ that you will not matriculate. Deposits are also refunded if you are drafted into the U. S. military service or in cases of emergency. If you matriculate, this deposit will be credited to your account in partial payment of the Tuition and Fee charges which will be due the College.

VI. Payment of a $_____Room Deposit is also required, if on-campus housing has been assigned. This deposit is non-refundable, except in cases of severe emergency or if you are drafted into the U. S. military service. If you matriculate, this deposit will be credited to your account in partial payment of the Housing Fee which will be due the College.

VII. You must also return to us a physical examination completed by a licensed physician.

_____
Director of Admissions

Form A-404

_____ College

ACCEPT OR DECLINE ADMISSION AND HOUSING
FORM MAILED TO ADMITTED APPLICANT

I acknowledge receipt of _____ College's notification of acceptance for admission as a (freshman/transfer) student and notify you that

____ I hereby accept admission for the term starting _____.
____ I hereby decline admission.
____ I hereby accept on-campus housing.
____ I hereby decline on-campus housing.

This card must be received in the _____College Admissions Office by ____(month, date)___ to guarantee Admission and Housing.

Signed_____

PLEASE PRINT NAME_____

Form Size: Post Card Stock

Form A-405

_____College

_____College

We hereby acknowledge receipt of the Deposits indicated below:

$_____Tuition Deposit - Refundable if Withdrawal Notice received by _____(date)_____.

$_____Housing Deposit - Refundable if Withdrawal Notice received by _____(date)_____.

_____ _____

Date Business Manager

All deposits are refundable if you are inducted into military service or in cases of special emergency.

_____

Name

_____

Street Address

_____

City State Zip Code

Please print or type your full name, and complete mailing address in the space provided. Return all three copies with your deposit payment(s) and your Notification of Acceptance of Admission to the Admissions Office.

_____
(College Name)

Sub-System V. Processing of Applicant Responses

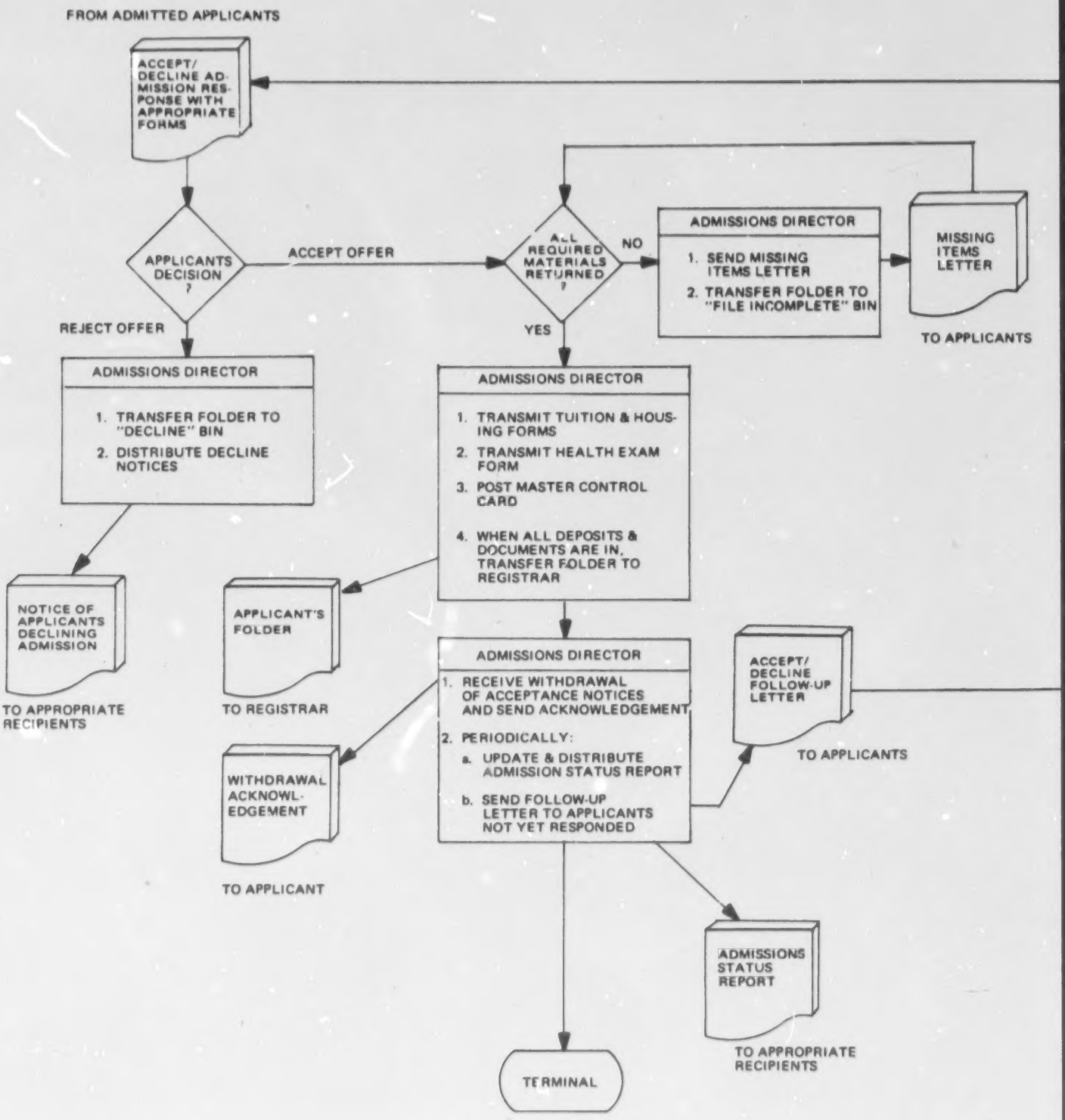
Action	Performed by
Receive accept/decline admission responses from admitted applicants.	Admissions Director
If applicant has accepted admission, determine whether: . Tuition Deposit and Housing Deposit (if appropriate) have been remitted and whether applicant has completed and returned. Tuition and Housing Deposit Receipt (Form A-405). . Health examination form has been returned. . Financial Aid Award Acceptance Form has been executed and returned.	Admissions Director
1. If the required deposit(s), health examination or Financial Aid Award Acceptance were not returned: a. Send applicant notification of Receipt of Acceptance - Missing Items Letter (Form A-501). b. Transfer Applicant File Folder to "Admits Accepting-File Incomplete Bin."	Admissions Director
2. If required Tuition and Housing deposits were received a. Transmit deposits to Business Office with Tuition and Housing Fee Receipt Form. (If	

Sub-System V. Processing of Applicant Responses (Cont'd)

Action	Performed by
applicant failed to return fee receipt form, prepare one for him.)	
b. Transmit copy of Housing Deposit receipt form to Housing Director	Admissions Director
c. Post Application Master Control Card	Admissions Director
d. Transfer Applicant File Folder to "Admits Deposits In" bin.	
3. If Health Examination Form received, Transmit to medical director.	Admissions Director
Receive missing items from applicants in accordance with Notification of Receipt of Acceptance - Missing Items Letter. Follow appropriate procedures set forth above.	Admissions Director
Periodically follow-up applicants of missing items not received	
1. Send Applicant-Missing Items Follow-up (Form A-502).	Admissions Director
<u>If applicant rejected admission</u>	
1. Transfer Applicants File Folder to "Decline" Bin.	Admissions Director
2. Distribute notification of admitted applicants	

Action	Performed by
who declined admission to a. Financial Aid Director b. Coaches (if appropriate) c. Band Director (if appropriate)	
When all required deposits and documents have been received from applicant, remove Admissions Data Card from Applicants File Folder and file alphabetically in separate file. Transmit Applicants File Folder to Registrar for preparation of permanent records. (Folders should remain accessible to Admissions personnel for the purpose of year end data analysis.)	Admissions Director
Receive notification of withdrawal of acceptance of admission notice from applicant.	Admissions Director
Send letter acknowledging receipt of notification of withdrawal of acceptance of admission to applicant. (Form A-504)	Admissions Director
Periodically perform the following: 1. Update and distribute Admission Status Report (Form A-208). 2. Review folders of applicants who have not responded to admission offer and send Admission Accept or Decline follow-up letter (Form A-503).	Admissions Director

SUB-SYSTEM V. Processing of Applicant Responses



Form A-501

_____ College

Dear Applicant:

We were pleased to receive your notification of acceptance of admission at _____College. However, we have not yet received the items checked below. All these items must be forwarded before your admission can be considered complete.

_____ Tuition Deposit check of $_____due immediately.

_____ Housing Deposit check of $_____.

_____ Accept or Decline Financial Aid Award Letter.

_____ Health Examination Report to be completed and returned by your physician as soon as possible.

Thank you for your prompt attention to these matters.

Cordially,

_____
Admissions Director

_____ College

Dear

A review of your file reveals that we still have not received the following items:

Tuition Deposit Check of $_____

Housing Deposit Check of $_____

Accept or Decline Financial Aid Award Letter

Health Examination Report

If the missing items indicated above have not yet been sent to us, please do so in order to protect the admission and housing space reserved for you.

Cordially,

_____
Admissions Director

Form A-503

_____College

Dear

According to our records, we mailed our notification of acceptance for admission to _____College to you at the above address on ___(date)_____. To date we have no record of your response to this offer. In fairness to the many other qualified students who are applying for admission, we cannot hold your place at _____College beyond ___(date)_____.

Please contact the Admissions Office as soon as possible regarding your decision to enroll at_____College. Thank you.

Cordially,

_____
Admissions Director

_____College

Dear

We acknowledge receipt of your notification of withdrawal of your acceptance of admission as a (freshman/transfer) student at _____ College.

We will notify the Business Office of your decision not to enroll. They, in turn, will contact you directly concerning any refund of your tuition deposit due you.

While we regret your decision not to enroll at our College, we wish you success in your alternate plans.

Cordially,

_____
Admissions Director

cc: Business Manager

bcc: Financial Aid Director
Registrar
Dean of Students
Housing Director
Coaches
Band Director

SECTION III

FINANCIAL AID

The primary function of the financial aid system is to allocate the institution's financial aid resources in a manner which provides the maximum benefit to those students who require aid. Secondarily, the manner and timing by which this aid is dispensed can have a material influence on the institution's ability to achieve its enrollment objectives.

The financial aid system incorporates several features which are worth noting here:

1. An operating plan defining the policies to be followed and estimating the funds to be available by source of fund is developed and coordinated with the Admissions Plan before its presentation for approval.

2. Need is determined on the basis of proper documentation; specifically, the Parents Confidential Statement or the Family Financial Statement.

3. Awards are closely controlled against available funds, helping to insure that the institution does not over-extend itself in awarding financial aid.

4. Notification of a financial aid award is made simultaneous with notification of admission.

5. The system includes procedures for periodic reporting of the financial aid position with respect to category of student and source of funding.

In order to provide applicants with simultaneous notification of admission and financial aid award on a timely basis, the Financial Aid Director may have to make a percentage of his award determinations in advance of actual funding. This should present no difficulty in the case of institutionally controlled sources of funding since the funding sources are generally fairly stable. On the other hand, there is no guarantee that Federal program funds will be made available in amounts equal to or greater than those received the previous year. If the College wishes to make some awards prior to grant notification, an anticipated funding level must be estimated, and the College must limit its advance commitments of such funds to

a total that is within the funding level estimated for each Federal program.

To assist applicants and their parents in determining the level of contribution which they may be expected to make toward a college education, a guide for estimating college expenses has been developed for distribution to applicants along with other financial aid materials. The form contains estimates of college expenses for both residents and commuter students as well as tables which indicate the ranges of parental contribution, student summer earnings, institutional aid, and other sources of funding that typically apply given several levels of family income. By reviewing this guide, applicants and their parents should be able to determine quickly whether the college being considered represents an economically feasible choice of institution.

The student employment procedures are designed to make effective use of student employees in accomplishing tasks the college would otherwise be unable to undertake. The personnel procedures are modeled upon those the students are likely to encounter after graduation. While it was not possible to indicate in the forms or procedures that pay differentials might be employed in recognition of previous experience, excellence in performance, or the level of job difficulty, we believe that these factors might well be considered in establishing pay rates. Conversely, when student employees fail to perform satisfactorily, we see no reason why they should not be held accountable for their actions and employment terminated if such action is appropriate.

To assure effective coordination of the financial aid program with the admissions program and to provide adequate financial control, we recommend that the Financial Aid Committee be composed of the Dean of Students, the Financial Aid Director, the Admissions Director, the Business Manager, and a faculty representative.

Again, students may serve as committee members provided they do not have access to financial data regarding existing or potential students.

Because of the close relationship between the admissions and financial aid functions, the college might wish to establish a single committee to develop policy for both activities, instead of maintaining a separate committee for each.

_____
(College Name)

Sub-System I - Preparation of Financial Aid Plan

Action	Performed by
Review Long Range Plan to determine 1. Estimated enrollments by program: a. Continuing students b. New students: - Freshman - Transfer 2. Proposed changes in tuition and fees (Room, Board, other) 3. Proposed program changes over the next five years. 4. Broad financial aid utilization policies. 5. Estimate of available financial aid resources. a. Funded resources b. Unfunded resources 6. Desired student body composition with regard to such factors as: a. Geographical, economic and cultural background b. Male/Female distribution c. Residential/non-residential distribution d. Academic background	Financial Aid Director

_____
(College Name)

Sub-System I - Preparation of Financial Aid Plan (Cont'd)

Action	Performed by
Review historical data to determine: 1. Number of presently enrolled students receiving aid. 2. Nature of current aid packaging ratios. 3. Current average financial aid award. 4. Total financial aid granted this year: a. Funded b. Unfunded 5. Amounts of financial aid currently allocated to: a. Athletics b. Band c. Other special programs 6. Estimate of financial aid funds that will remain available for future operations (by program).	Financial Aid Director
Review other data available 1. Government documentation of changes in policy or regulations. 2. Applications submitted for Government grants for next year. 3. Registrar's estimate of the number of continuing students by class and program.	Financial Aid Director

_____
(College Name)

Sub-System I - Preparation of Financial Aid Plan (Cont'd)

Action	Performed by
Review last year's 1. Financial Aid Operating Policies. 2. Financial Aid Allocation Plan. 3. Problems encountered and resolved.	Financial Aid Director
Prepare statement of proposed changes in financial aid operating policies (Forms FA-101 and FA-102).	Financial Aid Director
Review proposed changes in policy.	Financial Aid Committee
Revise, if necessary, and re-submit statement of proposed financial aid operating policies.	Financial Aid Director
Approve statement of proposed financial aid operating policies.	Financial Aid Committee
Prepare financial aid allocation plan for next fiscal year (Form FA-103).	Financial Aid Director
Review financial aid allocation plan.	Financial Aid Committee

_____
(College Name)

Sub-System I - Preparation of Financial Aid Plan (Cont'd)

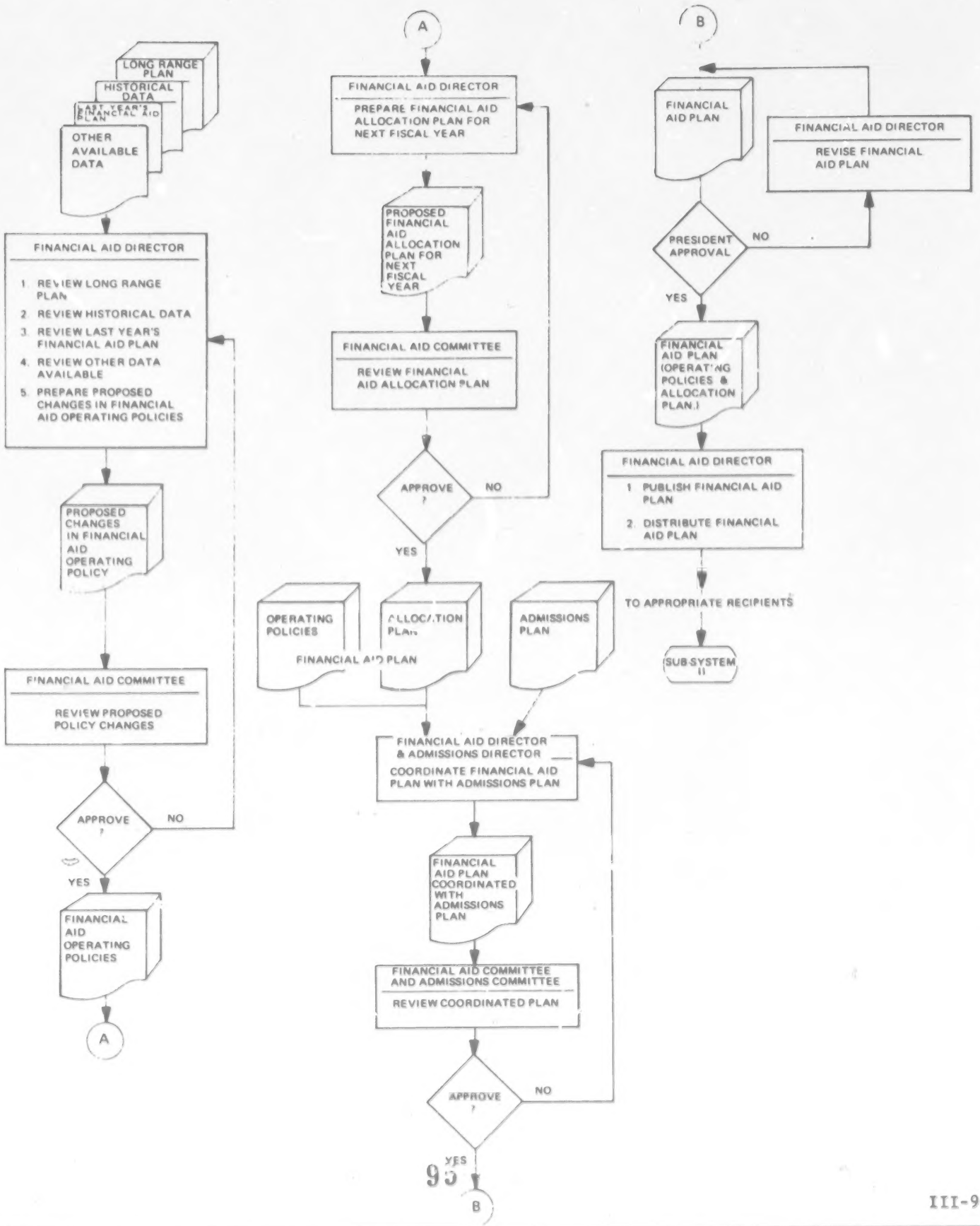
Action	Performed by
Revise, if necessary, and re-submit financial aid allocation plan.	Financial Aid Director
Approve financial aid allocation plan.	Financial Aid Committee
Coordinate financial aid plan (operating policies & allocation plan) with Admissions Plan	Financial Aid Director & Admissions Director
Submit coordinated financial aid plan and admissions plan for review and approval.	Financial Aid Director & Admissions Director
Review coordinated financial aid plan and admissions plan.	Financial Aid Committee & Admissions Committee
Revise, if necessary, and re-submit financial aid plan.	Financial Aid Director
Approve coordinated financial aid plan and admissions plan. Submit approved financial aid plan to President for review and make necessary revisions before proceeding.	Financial Aid Committee & Admissions Committee

_____
(College Name)

Sub-System I - Preparation of Financial Aid Plan (Cont d)

Action	Performed by
Publish financial aid plan. Distribute copies to: 1. President 2. Members of Financial Aid Committee 3. Admissions Director - (Copies for interviewer) 4. Business Manager 5. Academic Dean 6. Dean of Student Services 7. Director of Development (Alumni)	Financial Aid Director

SUBSYSTEM I Preparation of Financial Aid Plan



_____ COLLEGE

PROPOSED CHANGES IN FINANCIAL AID PROGRAM OPERATING POLICIES FOR FISCAL YEAR BEGINNING _____

Factors	Policy
1. Maximum percentage of cost to student to be covered by financial aid	
2. Sources of financial aid funds to be used for: a) athletic b) band c) academic d) other programs	
3. Identify academic programs for which financial aid funds will be used to attract student transfers.	
4. Award Limitations (Form FA-102): a) freshman b) transfer students c) continuing students	
5. Packaging ratios for: a) loans b) grants c) work/study programs	
6. Changes in verification of need procedures	
7. Academic requirements for continuation of: a) merit scholarships b) unfunded grants and aid c) funded scholarships d) athletic scholarships	
8. Authorization of following to make tentative awards while interviewing: a) coaches b) admissions interviewers c) band recruiters	
9. Conditions under which persons other than financial aid director may tentatively award funds to freshmen and transfers in: a) academic programs b) band c) athletic programs	
10. Other factors revelant to specific programs.	

(Signature) Chairman, Financial Aid Committee _____ Date _____

Form FA-102

_____ COLLEGE

Financial Aid Award Guidelines
Fiscal Year Beginning _____

Element of Cost to Student	Estimated Cost to Students	
	Residential	Commuting
Tuition and Fees	$	$
Room		
Meals		
Books		
Travel		
Other		
Total	$	$

Financial Aid Award Guidelines	Residential			Commuting		
	Freshman	Transfer Students	Continuing Students	Freshman	Transfer Students	Continuing Students
Minimum to be Borne by Student	$	$	$	$	$	$
Maximum Award	$	$	$	$	$	$
Average Award	$	$	$	$	$	$
Number of Students Estimated to Require Aid						
Estimated Total Awards						

FINANCIAL AID ALLOCATION PLAN FISCAL YEAR BEGINNING 19_____

SOURCE OF FUNDS			ESTIMATE AVAILABLE FUNDS			TO BE COMMITTED PRIOR TO FUNDING	PLANNED ALLOCATION OF FUNDS TO BE COMMITTED											
			UNALLOCATED	NEW FUNDS	TOTAL		CONTINUING STUDENTS			FRESHMAN			TRANSFER			SPECIAL STUDENTS		
							Band	Athletic	Other	Band	Athletic	Other	Band	Athletic	Other	Band	Athletic	Other
FEDERAL	MATCHED	NSDL																
		NSDL (NURSING)																
		E.O.G.																
		C.W.S.																
	UNMATCHED	EDUC. TAL. SEARCH																
		UPWARD BOUND																
		OTHER SPECIAL PROGRAMS																
		TOTAL																
STATE		GRANTS																
		LOANS																
		TOTAL																
COLLEGE	FUNDED	RESTRICTED ENDOWMENT																
		RESTRICTED GIFTS & GRANTS																
		UNRESTRICTED ENDOWMENT																
		UNRESTRICTED GIFTS & GRANTS																
		LOAN FUNDS																
	UNFUNDED	GRANTS IN AID																
		CAMPUS EMPLOYMENT																
		TOTAL																
TOTAL FINANCIAL AID			$	$	$	$	$	$	$	$	$	$	$	$	$	$	$	$

FORM FA 103

_____
(College Name)

Sub-System II - Distribution of Financial Aid Application Material

Action	Performed by
Furnish Admissions Director with Financial Aid Application Materials for distribution to applicants for admission. Financial Aid Application Materials include: 1. Letter of transmittal and instructions -- Form FA-201 2. College brochure indicating types of aid available and restrictions applicable to each 3. Financial Aid application card -- Form FA-202 4. Guide to Meeting College Expenses -- Form FA-205	Financial Aid Director
Co-sponsor orientation session for interviewers. Distribute and explain: 1. Financial Aid Operating Policies -- Form FA-101 and Form FA-102 2. Financial Aid Allocation Plan -- Form FA-103 3. Financial Aid Application Materials 4. Interviewer's Visitation Report (Admissions Form A-202) 5. Candidate Interview Report (Admissions Form A-203) 6. Procedures to be followed in implementation of Financial Aid Plan	Financial Aid Director & Admissions Director

_____
(College Name)

Sub-System II - Distribution of Financial Aid Application Material (Cont'd)

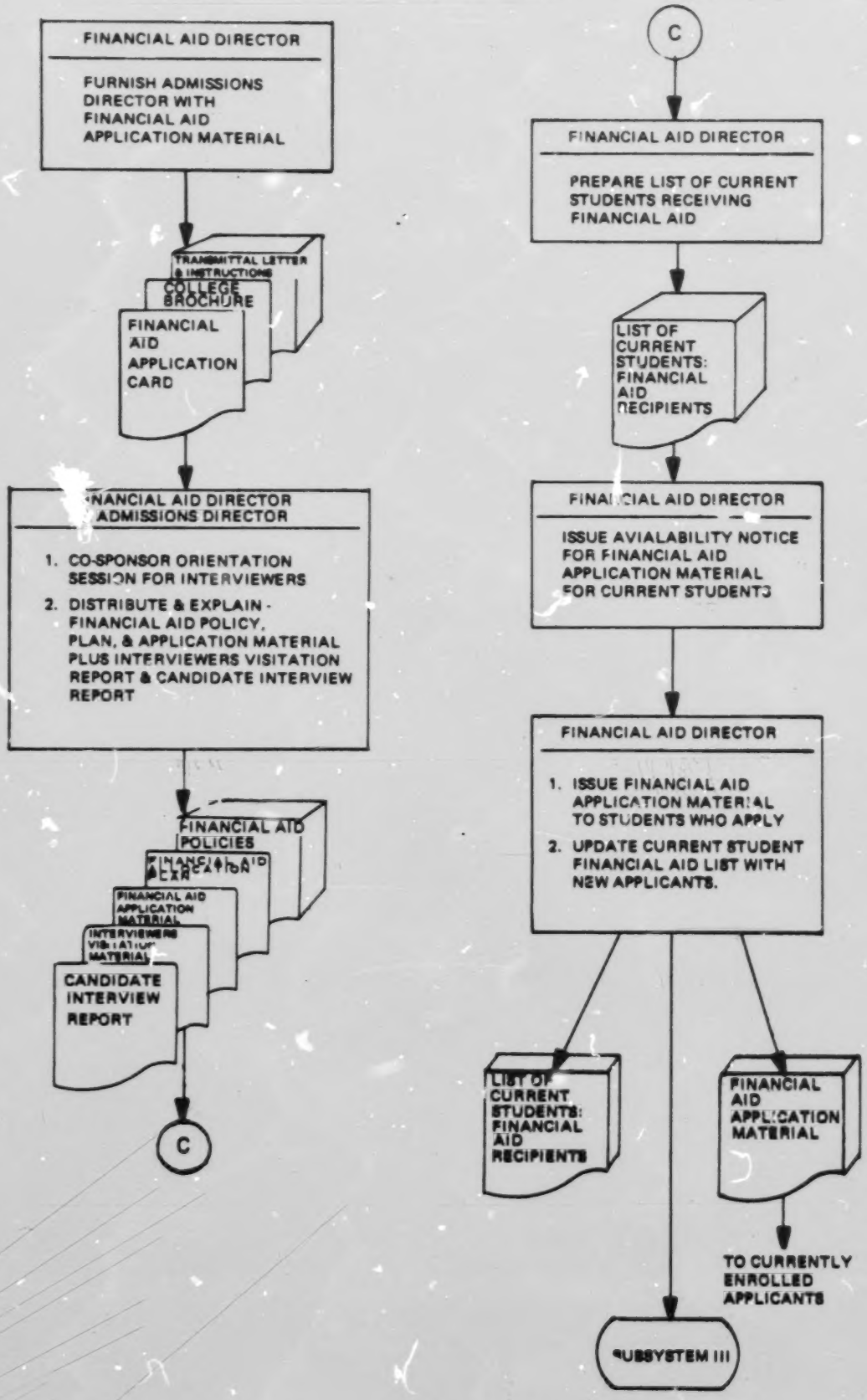
Action	Performed by
Prepare applicant file -- Form FA-203 -- on each candidate needing financial aid.	Financial Aid Director
Prepare applicant check list for each candidate -- Form FA-204.	Financial Aid Director
Prepare alphabetical listing of students currently enrolled receiving financial aid -- Form FA-206.	Financial Aid Director

_____
(College Name)

Sub-System II - Distribution of Financial Aid Application Material (Cont'd)

Action	Performed by
Issue notification of availability of financial aid applications material for continuing students at Financial Aid Office to college newspaper. Post similar notice on all bulletin boards and send similar notice to the Registrar, Dean of Students, Academic Dean and Business Manager.	Financial Aid Director
Issue financial aid application materials to students who apply at Financial Aid Office. Check off names of students to whom issued and add names of students given application material if not on pre-prepared list (Form FA-206) Financial Aid application material includes: (a) Financial Aid Application Card - Form FA-202 (b) Parents' Confidential Statement - Renewal (College Scholarship Service Form) or Family Financial Statement - Renewal (American College Testing Program)	Financial Aid Director

SYSTEM II Distribution of Finanical Aid Application Material


FINANCIAL AID DIRECTOR
FURNISH ADMISSIONS DIRECTOR WITH FINANCIAL AID APPLICATION MATERIAL
TRANSMITTAL LETTER & INSTRUCTIONS
COLLEGE BROCHURE
FINANCIAL AID APPLICATION CARD
NANCIAL AID DIRECTOR
ADMISSIONS DIRECTOR
1. CO-SPONSOR ORIENTATION SESSION FOR INTERVIEWERS
2. DISTRIBUTE & EXPLAIN - FINANCIAL AID POLICY, PLAN, & APPLICATION MATERIAL PLUS INTERVIEWERS VISITATION REPORT & CANDIDATE INTERVIEW REPORT
FINANCIAL AID POLICIES
FINANCIAL AID APPLICATION CARD
FINANCIAL AID APPLICATION MATERIAL
INTERVIEWERS VISITATION MATERIAL
CANDIDATE INTERVIEW REPORT
C
C
FINANCIAL AID DIRECTOR
PREPARE LIST OF CURRENT STUDENTS RECEIVING FINANCIAL AID
LIST OF CURRENT STUDENTS: FINANCIAL AID RECIPIENTS
FINANCIAL AID DIRECTOR
ISSUE AVIALABILITY NOTICE FOR FINANCIAL AID APPLICATION MATERIAL FOR CURRENT STUDENTS
FINANCIAL AID DIRECTOR
1. ISSUE FINANCIAL AID APPLICATION MATERIAL TO STUDENTS WHO APPLY
2. UPDATE CURRENT STUDENT FINANCIAL AID LIST WITH NEW APPLICANTS.
LIST OF CURRENT STUDENTS: FINANCIAL AID RECIPIENTS
FINANCIAL AID APPLICATION MATERIAL
TO CURRENTLY ENROLLED APPLICANTS
SUBSYSTEM III

_____ College

Dear Applicant for Financial Aid,

Please execute the following steps so that we may evaluate your financial need during the 19__ academic year:

1. Complete and return the enclosed Financial Aid Application Card immediately.

2. Obtain a [College Scholarship Service (CSS), Parents' Confidential Statement (PCS) or American College Testing Program (ACTP), Family Financial Statement (FFS)]from your High School Guidance Counselor or Principal. If these forms are not available at your high school, indicate this on the Application Card and we will send them to you.

3. Complete the[Parents' Confidential Statement/Family Financial Statement]and return it to [CSS or ACTP] as soon as possible.

When the [CSS/ACTP] receives your[Parents' Confidential Statement/Family Financial Statement],they will evaluate the financial assistance you require to attend _____ College.

We will process your request for Financial Aid when we receive that need evaluation from [CSS/ACTP] and will contact you immediately upon reaching a decision.

Only after receipt of your Financial Aid Application Card and appropriate data from the [College Scholarship Service/American College Testing Program] will we be able to process your application. Prompt completion of these requirements will enhance our ability to respond to your needs.

Should you have any questions related to these matters, please do not hesitate to be in touch with us.

Sincerely,

_____
Director of Financial Aid

Enclosures

Form FA-202

FINANCIAL AID APPLICATION CARD

NEW STUDENTS AND CONTINUING STUDENTS*

TO: Financial Aid Director, _____ College

I would like to apply for financial aid for the academic year _____.

Full Name: _____

Current Address: _____

_____

☐ Check here only if you are not able to obtain a (Parent's Confidential Statement/Family Financial Statement) form.

If box is checked, we will send forms to you.

Student Status: Freshman Applicant ( ), Transfer Applicant ( )

Currently enrolled at _____ College ( )

Signature: _____

Form Size - 3"x5"

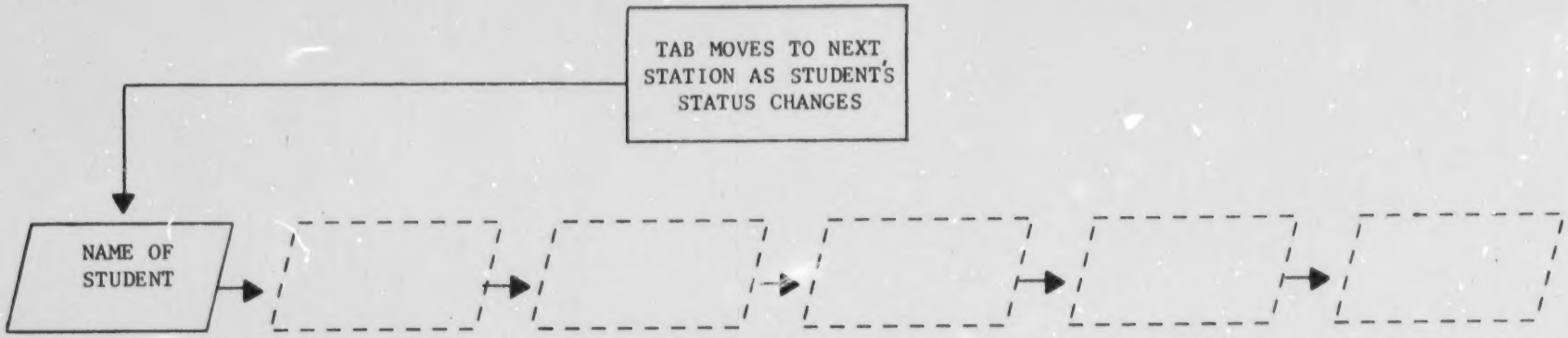
*NOTE: The above card can be used as a renewal or new application for continuing students by making the following changes:

1. Eliminate reference to PCS/FFS forms
2. Eliminate postage and address from back of card (continuing students should fill out the card in the financial aid office).

_____ COLLEGE APPLICANT FILE

SAMPLE STUDENT FILE JACKET FOR FRESHMEN AND TRANSFERS REQUESTING FINANCIAL AID

(ALPHABETICAL ORDER)



STATUS 1	STATUS 2	STATUS 3	STATUS 4	STATUS 5	STATUS 6
Received Candidate Interview Report	Received Financial Aid Application Card	Received 1. Family Financial Statement or Parents Confidential Statement with financial need report from CSS/ACTP 2. Notice of special award from discretionary funds	Received Notice of Admission Acceptance	Received Notice of award determined by Financial Aid Director Sent Award notice to student with letter requesting decision	Received Financial Aid Award acceptance/ refusal notice from student

Form FA-203

_____ College

FINANCIAL AID APPLICANT CHECKLIST

Name: _____ Student Status: New Admissions Applicant ____ _____

Social Security No. _____ Currently Enrolled _____

Item	Date
1. Received Candidate Interview Report	
2. Received Financial Aid Application Card	
3. Received Financial Need Evaluation Report Form (American College Testing Program or College Scholarship Service)	
4. Sent follow-up letter or made personal contact for failure to receive Financial Need Evaluation Report...or Need Evaluation received but no Application Card Received	
5. New Admission Applicants Only: Received Admissions Office Notice of Admission Decision: Accept_____ Reject_____	
6. Award Notification Prepared: New Students: Sent to Admissions_____ Continuing Students: Sent to Student_____	
7. Currently Enrolled Only: Received year-end notification of student status General Status_____ Academic Status_____ (from Registrar)	
8. Received Notice from student accepting Award	
9. Posted Permanent Award on Financial Aid Master Control Card	

Item	Date
10. Received Notice of Withdrawal of Admission or Withdrawal of Award Acceptance	
11. Financial Aid Award Amended	
12. NSDL Oath Executed	
13. Award Agreement Forms Executed	
14. Student Employment Agreement Executed	

GUIDE TO MEETING COLLEGE EXPENSES

FORM FA 205

_____ COLLEGE

This Guide is provided to assist _____ College applicants and their families in estimating college expenses and the aid that may be available to students with financial need. The tables below provide information regarding (1) annual college expenses for commuting students and resident students and (2) tables suggesting typical sources of funds to meet those expenses. It is important to keep in mind that these tables are intended to serve only as a guide in approximating the amount of financial support from each source. Financial aid, particularly from college sources, may vary from these estimates as awards are based upon the specific financial need of the individual applicant as well as the continuing availability of funds. Nothing in this document should be interpreted as a commitment on the part of _____ College to provide financial aid in any specified amount. To determine his eligibility for aid and the amount to which he may be entitled, each applicant must submit a financial aid application and appropriate supporting documentation as described in the college catalog. If the applicant or his family have questions regarding the use of this guide they should contact the _____ College Financial Aid Office.

1. ESTIMATED YEARLY EXPENSES AT _____ COLLEGE:

a) Commuting Students

Tuition and Fees	_____
Books	_____
Supplies	_____
Transportation	_____
Other Expenses	_____
Medical Coverage, Insurance, Personal Expenses, etc.	_____
Estimated Total Yearly Student Expenses	_____

b) Resident Students

Tuition and Fees	_____
Room	_____
Board	_____
Books	_____
Supplies	_____
Other Expenses	_____
Medical Coverage, Insurance, Personal Expenses, etc.	_____
Estimated Total Yearly Student Expenses	_____

2. TYPICAL SOURCES OF FUNDS TO MEET EXPENSES:

NOTE: These estimates are based upon annual family income, assuming a family of four. Variations in family size and unusual family expenses can significantly affect these estimates.

a) Commuting Students

Annual Gross Income for a Family of 4	SOURCES: Family Contribution	Student Summer Earnings	Institutional Sources	Other Sources	Total Amount Required to Meet College Expenses
$ 0- 2,999					
3,000- 5,999					
6,000- 7,499					
$ 7,500- 8,999					
9,000-11,999					
12,000- Over					

b) Resident Students

Annual Gross Income for a Family of 4	SOURCES: Family Contribution	Student Summer Earnings	Institutional Sources	Other Sources	Total Amount Required to Meet College Expenses
$ 0- 2,999					
3,000- 5,999					
6,000- 7,499					
7,500- 8,999					
9,000- 11,999					
12,000- Over					

_____ College

LIST OF STUDENTS CURRENTLY RECEIVING
FINANCIAL AID OR REQUESTING AID

Student's Name & Soc. Sec. Number	Issued Appli-cation	Appli-cation Received	Student's Name & Soc. Sec. Number	Issued Appli-cation	Appli-cation Received

_____
(College Name)

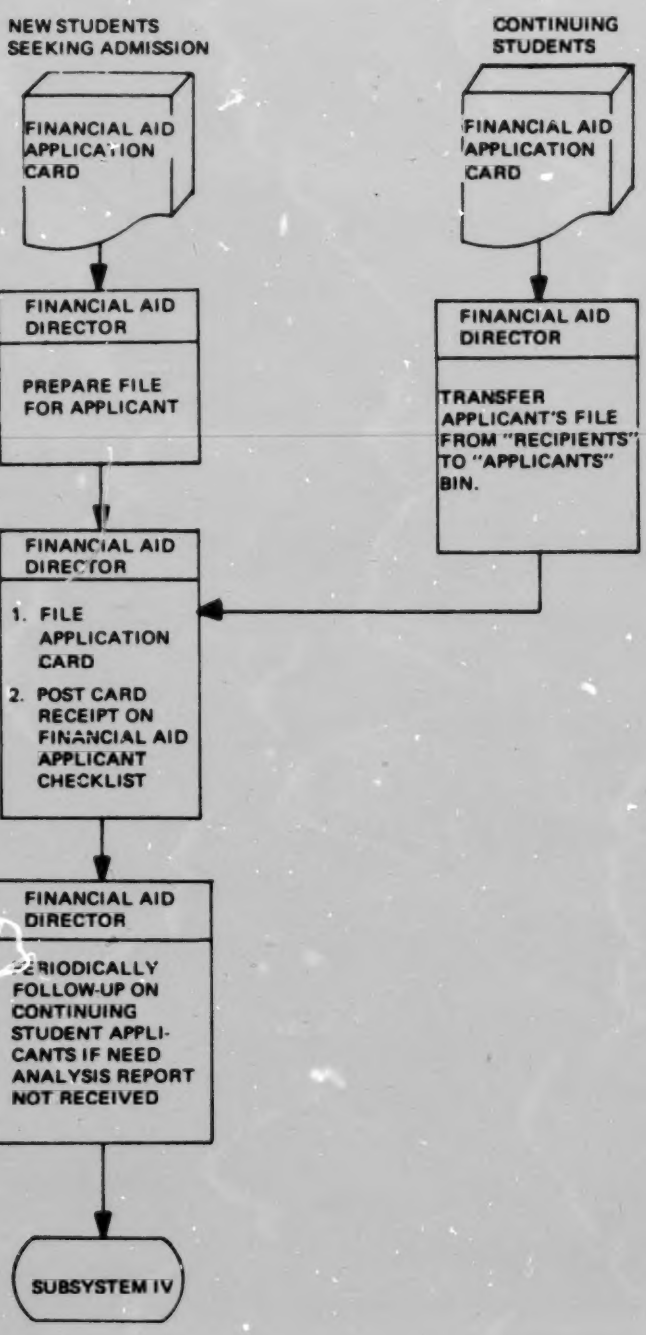
Sub-System III - Receipt of Applications

Action	Performed by
Receive Financial Aid Application Card submitted by applicants for admission.	Financial Aid Director
Open applicant files (Form FA-203) for Financial Aid applicants.	Financial Aid Director
File Financial Aid Application Card in applicant files (Form FA-203). Indicate materials filed on Applicant Check-List (Form FA-204).	Financial Aid Director
<u>Continuing Students</u> Receive Financial Aid Application Card from continuing students. Post date of receipt of application from continuing student opposite his name on list of existing students receiving Financial Aid (Form FA-206). Add names of continuing students who are applying for aid the first time. (Note: Continuing students would most likely fill out and submit the Application Card within the Financial Aid Office at the time of issuance.)	Financial Aid Director

Sub-System III - Receipt of Applications (Cont'd)

Action	Performed by
Transfer, for those continuing students submitting Application Cards, Financial Aid files from "Current Students-Award Recipients" bin to "Current Students-Applicants" bin. Insert a card in recipients bin to indicate that file was transferred.	Financial Aid Director
File Application Cards. Post on Financial Aid applicant. Checklist the materials filed.	Financial Aid Director
Check list of Students Requesting Aid (Form FA-206) and periodically make follow-up contacts for all continuing students; those who never applied for renewal of aid, and those issued application materials but for whom no [Parents Confidential Statement or Family Financial Statement] report has been received.	Financial Aid Director

SUBSYSTEM III Receipt of Applications


NEW STUDENTS SEEKING ADMISSION
FINANCIAL AID APPLICATION CARD
CONTINUING STUDENTS
FINANCIAL AID APPLICATION CARD
FINANCIAL AID DIRECTOR
PREPARE FILE FOR APPLICANT
FINANCIAL AID DIRECTOR
TRANSFER APPLICANT'S FILE FROM "RECIPIENTS" TO "APPLICANTS" BIN.
FINANCIAL AID DIRECTOR
1. FILE APPLICATION CARD
2. POST CARD RECEIPT ON FINANCIAL AID APPLICANT CHECKLIST
FINANCIAL AID DIRECTOR
PERIODICALLY FOLLOW-UP ON CONTINUING STUDENT APPLICANTS IF NEED ANALYSIS REPORT NOT RECEIVED
SUBSYSTEM IV

_____
(College Name)

Sub-System IV - Award Processing

Action	Performed by
Receive Financial Aid Need Analysis Report from (College Scholarship Service or American College Testing Program) and copies of (Parents Confidential Statement or Family Financial Statement).	Financial Aid Director
Ascertain whether students on Report are continuing, new or transfer students.	Financial Aid Director
Post to applicant check-list receipt of data from College Scholarship Service or American College Testing Program.	Financial Aid Director
Notify students who have submitted financial aid application whose names do not appear on Financial Need Analysis Reports. (Form FA-401).	Financial Aid Director
Post applicant check-list and file copy of letter.	Financial Aid Director
Repeat cycle until deadline date for financial aid award determination.	Financial Aid Director

_____
(College Name)

Sub-System IV - Award Processing (Cont'd)

Action	Performed by
Verify receipt of Financial Aid Application cards from all applicants listed on The Need Analysis Report. If cards were never received, notify applicant of receipt of Financial Aid Need Analysis Report and request submission of Application card (Form FA-402).	Financial Aid Director
Post applicant check-list and file copy of letter.	Financial Aid Director
Notify President of College of beginning dates for determination of Financial Aid award allocations.	Financial Aid Director
Submit to Financial Aid Director, prior to indicated date, disposition of any discretionary scholarship funds at his disposal.	President
Advise Financial Aid Director of any future dispositions of discretionary scholarship funds.	President
Receive from President notification of special awards from discretionary funds.	Financial Aid Director

_____
(College Name)

Sub-System IV - Award Processing (Cont'd)

Action	Performed by
Post to applicant check-list notification of special awards.	Financial Aid Director
Receive from Admissions Director, listing of new and transfer students accepted and rejected for admission to college	Financial Aid Director
Post to Applicant Check-list notice of receipt of acceptance or rejection.	Financial Aid Director
Withdraw files of applicants rejected for admission to college. File separately.	Financial Aid Director
Review each accepted applicant's folder including 1. Financial Aid Application Card 2. Data received from College Scholarship Service or American College Testing Program. 3. Special awards	Financial Aid Director
Determine level of need of each student	Financial Aid Director

_____
(College Name)

Sub-System IV - Award Processing (Cont'd)

Action	Performed by
Determine award and sources of financial aid funds to be applied for each new and transfer student. If award cannot be made within approved policy, request Financial Aid Committee's assistance in determining award.	Financial Aid Director
Make award determination for cases outside of policy	Financial Aid Committee
Post amount of awards on Roster of Financial Aid Awards (Form FA-403)	Financial Aid Director
Post temporary (pencil) entry on Financial Aid Master Card (Form FA-404)	Financial Aid Director
Prepare award notifications (Form FA-405). Post applicant check-list and place in applicant's folder.	Financial Aid Director
Post totals for Freshman and Transfer students to Master Control Schedule (Form FA-406). Indicate on Master Control Schedule new fund balances for new and transfer students.	Financial Aid Director

_____
(College Name)

Sub-System IV - Award Processing (Cont'd)

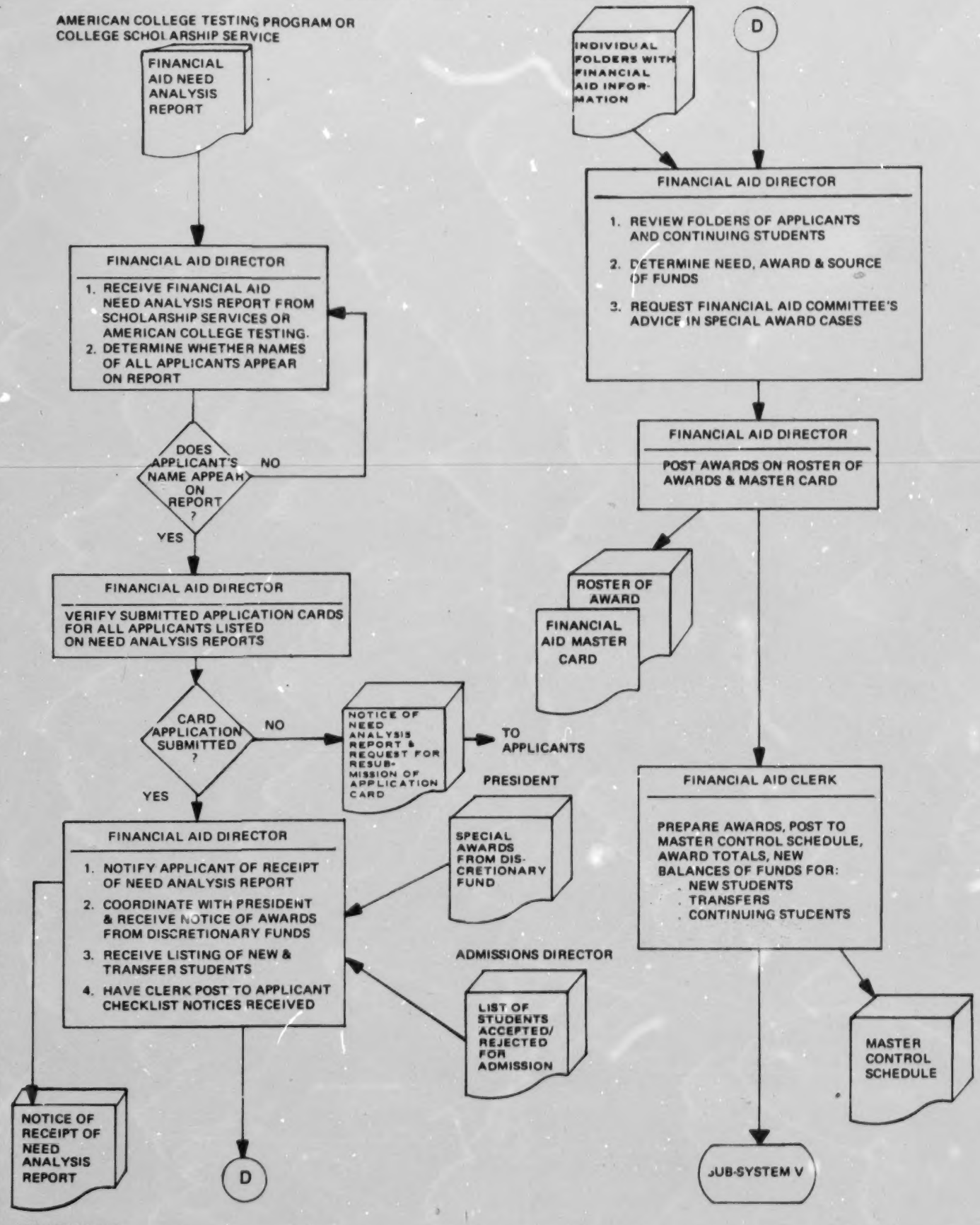
Action	Performed by
Review each continuing student's file including: 1. Financial Aid Application Card 2. Financial Need Analysis Report from College Scholarship Service or American College Testing Program. 3. Special awards 4. Prior years' awards	Financial Aid Director
Determine level of need of each student.	Financial Aid Director
Determine financial aid award and source of funds to be applied for each continuing student.	Financial Aid Director
If award cannot be determined within approved policy request Financial Aid Committee's assistance in determining award.	Financial Aid Director
Make award determinations for cases outside of policy.	Financial Aid Committee
Post amount of Award on Roster of Financial Aid Awards (Form-403).	Financial Aid Director
Post temporary entry of award on master card (Form FA-404).	Financial Aid Director

_____
(College Name)

Sub-System IV - Award Processing (Cont'd)

Action	Performed by
Prepare award notification (Form FA-405) and place in applicant's folder.	Financial Aid Director
Post totals of awards to continuing students to Master Control Schedule (Form FA-406).	Financial Aid Director
Indicate on Master Control Schedule new balances of funds remaining available for continuing students.	Financial Aid Director

SUB-SYSTEM IV Award Processing


AMERICAN COLLEGE TESTING PROGRAM OR COLLEGE SCHOLARSHIP SERVICE
FINANCIAL AID NEED ANALYSIS REPORT
INDIVIDUAL FOLDERS WITH FINANCIAL AID INFORMATION
D
FINANCIAL AID DIRECTOR
1. RECEIVE FINANCIAL AID NEED ANALYSIS REPORT FROM SCHOLARSHIP SERVICES OR AMERICAN COLLEGE TESTING.
2. DETERMINE WHETHER NAMES OF ALL APPLICANTS APPEAR ON REPORT
DOES APPLICANT'S NAME APPEAR ON REPORT ?
NO
YES
FINANCIAL AID DIRECTOR
VERIFY SUBMITTED APPLICATION CARDS FOR ALL APPLICANTS LISTED ON NEED ANALYSIS REPORTS
CARD APPLICATION SUBMITTED ?
NO
NOTICE OF NEED ANALYSIS REPORT & REQUEST FOR RESUBMISSION OF APPLICATION CARD
TO APPLICANTS
YES
PRESIDENT
SPECIAL AWARDS FROM DISCRETIONARY FUND
FINANCIAL AID DIRECTOR
1. NOTIFY APPLICANT OF RECEIPT OF NEED ANALYSIS REPORT
2. COORDINATE WITH PRESIDENT & RECEIVE NOTICE OF AWARDS FROM DISCRETIONARY FUNDS
3. RECEIVE LISTING OF NEW & TRANSFER STUDENTS
4. HAVE CLERK POST TO APPLICANT CHECKLIST NOTICES RECEIVED
ADMISSIONS DIRECTOR
LIST OF STUDENTS ACCEPTED/ REJECTED FOR ADMISSION
NOTICE OF RECEIPT OF NEED ANALYSIS REPORT
TO APPLICANT
D
FINANCIAL AID DIRECTOR
1. REVIEW FOLDERS OF APPLICANTS AND CONTINUING STUDENTS
2. DETERMINE NEED, AWARD & SOURCE OF FUNDS
3. REQUEST FINANCIAL AID COMMITTEE'S ADVICE IN SPECIAL AWARD CASES
FINANCIAL AID DIRECTOR
POST AWARDS ON ROSTER OF AWARDS & MASTER CARD
ROSTER OF AWARD
FINANCIAL AID MASTER CARD
FINANCIAL AID CLERK
PREPARE AWARDS, POST TO MASTER CONTROL SCHEDULE, AWARD TOTALS, NEW BALANCES OF FUNDS FOR:
. NEW STUDENTS
. TRANSFERS
. CONTINUING STUDENTS
MASTER CONTROL SCHEDULE
SUB-SYSTEM V

_____ College

In reviewing our records, we find that you were issued the necessary documents to apply for continued financial aid on _____. To date we have not yet received your need evaluation report from the (College Scholarship Service or American College Testing Program).

This document is required before any continuation of your financial aid can be considered.

If you do not intend to continue your education or no longer need financial assistance, please let us know as early as possible so that other needy students can be assisted.

_____

Financial Aid Director

_____ College

We have received your (Parents Confidential Statement or Family Financial Statement) from the (College Scholarship Service or American College Testing Program). This indicates that you intended to apply for financial aid at _____ College. However, upon reviewing our records, we find that we have not yet received your financial aid application card.

No consideration can be given to a financial aid request until this document is received. If you still intend to apply for financial aid at _____ College, please complete and return the enclosed financial aid application card immediately.

If you are no longer contemplating attending our College or no longer need financial assistance, we would appreciate your advising us so that other needy students can be assisted.

_____
Financial Aid Director

_____ COLLEGE

ROSTER OF FINANCIAL AID AWARDS

*STUDENT STATUS (Freshman/Transfer/Continuing)

STUDENT NAME & SOC. SEC. NUMBER	TOTAL AMOUNT	TYPE OF ENTRY				FEDERAL			STATE		OTHER FUNDED		OTHER UNFUNDED		COMMENTS
		ACCEPT	REJECT	CANCEL	ADJUST	NDSL	EOG	CWS	Grants	Loans	Restricted	Unrestricted	Campus Employment	Grants in Aid	
	ENTER SIGNED AMOUNTS (+) OR (–)														

* NOTE: A SEPARATE SHEET SHOULD BE PREPARED FOR EACH STUDENT TYPE (i.e., Freshman, Transfer, or Continuing Students)

FORM – FA-403

FINANCIAL AID MASTER CARD

_____ College STUDENT MASTER CARD IN-SCHOOL STUDENT

NAME

LOCAL ADDRESS

SOCIAL SECURITY NUMBER

PERMANENT ADDRESS

SEPT 69 70 71 72 73 7

ACADEMIC LEVEL: F So J Sr G1 G2 G3 G4

SOURCE OF RECRUITMENT

S.A.T. SCORE: VERB MATH

HIGH SCHOOL RANK

SEX RACE

1 CURRENT YEAR AWARD 1969-70

CWS AWARD $			EOG AWARD $		NDSL AWARD $		OTHER (NONSTUDENT) SOURCES	
TOTALS	ON-CAMPUS	OFF-CAMPUS	PAYMENTS	TYPE	(DATE) ADVANCE ON LOAN	(AMOUNT)	TYPE	AMOUNT

OTHER ANNUAL INFORMATION

1. FAMILY INCOME $
2. NUMBER OF CHILDREN IN FAMILY
3. LOW INCOME PREFERENCE YES NO
4. REMEDIAL OR TUTORIAL WORK YES NO
5. INDEPENDENT STUDENT YES NO

2 CURRENT YEAR AWARDS 197 - 197

CWS AWARD $			EOG AWARD $		NDSL AWARD $		OTHER (NONSTUDENT) SOURCES	
TOTALS	ON-CAMPUS	OFF-CAMPUS	PAYMENTS	TYPE	(DATE) ADVANCE ON LOAN	(AMOUNT)	TYPE	AMOUNT

OTHER ANNUAL INFORMATION

1. FAMILY INCOME $
2. NUMBER OF CHILDREN IN FAMILY
3. LOW INCOME PREFERENCE YES NO
4. REMEDIAL OR TUTORIAL WORK YES NO
5. INDEPENDENT STUDENT YES NO

3 CURRENT YEAR AWARDS 197 - 197

CWS AWARD $			EOG AWARD $		NDSL AWARD $		OTHER (NONSTUDENT) SOURCES	
TOTALS	ON-CAMPUS	OFF-CAMPUS	PAYMENTS	TYPE	(DATE) ADVANCE ON LOAN	(AMOUNT)	TYPE	AMOUNT

OTHER ANNUAL INFORMATION

1. FAMILY INCOME $
2. NUMBER OF CHILDREN IN FAMILY
3. LOW INCOME PREFERENCE YES NO
4. REMEDIAL OR TUTORIAL WORK YES NO
5. INDEPENDENT STUDENT YES NO

4 CURRENT YEAR AWARDS 197 - 197

CWS AWARD $			EOG AWARD $		NDSL AWARD $		OTHER (NONSTUDENT) SOURCES	
TOTALS	ON-CAMPUS	OFF-CAMPUS	PAYMENTS	TYPE	(DATE) ADVANCE ON LOAN	(AMT.)	TYPE	AMOUNT

OTHER ANNUAL INFORMATION

1. FAMILY INCOME $
2. NUMBER OF CHILDREN IN FAMILY
3. LOW INCOME PREFERENCE YES NO
4. REMEDIAL OR TUTORIAL WORK YES NO
5. INDEPENDENT STUDENT YES NO

5 CURRENT YEAR AWARDS 197 - 197

CWS AWARD $			EOG AWARD $		NDSL AWARD $		OTHER (NONSTUDENT) SOURCES	
TOTALS	ON-CAMPUS	OFF-CAMPUS	PAYMENTS	TYPE	(DATE) ADVANCE ON LOAN	(AMT.)	TYPE	AMOUNT

OTHER ANNUAL INFORMATION

1. FAMILY INCOME $
2. NUMBER OF CHILDREN IN FAMILY
3. LOW INCOME PREFERENCE YES NO
4. REMEDIAL OR TUTORIAL WORK YES NO
5. INDEPENDENT STUDENT YES NO

SUMMARY OF AWARDS

COLLEGE WORK-STUDY PROGRAM				EDUCATIONAL OPPORTUNITY GRANT PROG.			NATIONAL DEFENSE STUDENT LOAN PROGRAM				OTHER SOURCES		
YEAR	AMOUNT	YEAR	AMOUNT	YEAR	TYPE	AMOUNT	YEAR	AMOUNT	YEAR	AMOUNT	YEAR	TYPE	AMOUNT

Form FA-404

Reprinted from OEO Manual [#OEO-0-9-717005-4541(009)] Jan. '70 edition.

BACK OF FINANCIAL AID MASTER CARD

NAME OF STUDENT | SOCIAL SECURITY NUMBER

1 1969-70 CWS AMOUNT OF AWARD $ | PROJECT IDENTIFICATION | $ PER HOUR

PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH	PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH

2 197 -7 CWS AMOUNT OF AWARD $ | PROJECT IDENTIFICATION | $ PER HOUR

PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH	PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH

3 197 -7 CWS AMOUNT OF AWARD $ | PROJECT IDENTIFICATION | $ PER HOUR

PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH	PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH

4 197 -7 CWS AMOUNT OF AWARD $ | PROJECT IDENTIFICATION | $ PER HOUR

PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH	PAY PERIOD FROM	TO	TOTAL	CASH	NONCASH

DATE

STUDENT NO LONGER IN ATTENDANCE

1. ☐ GRADUATED
2. ☐ FINANCIAL PROBLEMS
3. ☐ ACADEMIC PROBLEMS
4. ☐ OTHER--STATE REASON---

DATE

STUDENT IN ATTENDANCE BUT NO LONGER ELIGIBLE FOR FINANCIAL AID. INELIGIBLE FOR:

☐ EOG (PARENTAL CONTRIBUTION OVER $625)
☐ CWS-REASON:
☐ NDSL-REASON:

Form FA-404

Reprinted from OEO Manual 1# OEO-0-9-717005-4543(000) Jan. '70 edition.

FOR FINANCIAL AID MASTERCARD

Explanation of Codes:

Family Income:
A. 0-$2,999
B. $3,000-$5,999
C. $6,000-$7,499
D. $7,500-$8,999
E. $9,000-and over

Low Income Preference:
1. yes
2. no

Source of Recruitment:
1. upward bound
2. edc.talent search
3. disadvantaged student from high school
4. other

SAT/ACT Scores:
insert actual number

High School Rank:
1. top quarter
2. 2nd quarter
3. 3rd quarter
4. bottom quarter

Number of Children in Family:
insert actual number

Remedial or Tutorial Work:
1. prior summer
2. academic year
3. current summer

Race or Ethnic Group:
A. American Negro
B. American Indian
C. Oriental American
D. Spanish Surnamed American
E. All Other

EOG Award Year:
A. initial year
B. 1st year
C. 2nd year
D. 3rd year

Form FA- 404

Reprinted from OEO Manual (#OEO-0-9-717005-4541 (009) Jan. '70 edition

_____ College

I acknowledge receipt of your offer of financial assistance for the academic year beginning _____, as indicated below. I understand that your offer is contingent upon my remaining a student in good standing or other academic requirements and further understand that the portion of your award offer, if any, applicable to my room and board costs is contingent upon my continuing to reside in College operated housing.

Financial Assistance Offered:

Type	1st Semester Amount	2d Semester	Total
National Defense Student Loan	$		
Educational Opportunity Grant			
College Work Study			
College Sponsored Campus Employment			
College Scholarship			
College Loan			
Educational Talent Search			
Upward Bound			

Total Award Offered $_____

I accept_____ reject_____ the above offer of financial assistance and the conditions relative thereto. I will_____ will not _____ execute the necessary financial aid agreement forms at the time of registration.

_____ (Applicant's Name)

_____ (date)

_____ (Applicant's Social Security Number)

_____ (Applicant's Signature)

_____ Street Address

_____ City State Zip Code

_____ COLLEGE

MASTER CONTROL SCHEDULE

* STUDENT TYPE FRESHMEN/ TRANSFER/ CONTINUING.	SOURCE OF FINANCIAL AID													TOTALS
	FEDERAL						STATE		COLLEGE FUNDED			COLLEGE UNFUNDED		
	NSDL	EOG	CWS	UPWARD BOUND	ED. TAL SEARCH	OTHER SPECIAL PROGRAMS	LOANS	GRANTS	RE-STRICTED	UNRE-STRICTED	LOANS	EMPLOY-MENT	GRANTS IN AID	
PLANNED ALLOCATION														
AMOUNT AWARDED														
BALANCE DATE_____														
AMOUNT AWARDED														
BALANCE DATE_____														
AMOUNT AWARDED														
BALANCE DATE_____														
AMOUNT AWARDED														
BALANCE DATE_____														
AMOUNT AWARDED														
BALANCE DATE_____														
AMOUNT AWARDED														
BALANCE DATE_____														

* PREPARE SEPARATE SCHEDULES FOR FRESHMAN, TRANSFERS, AND CONTINUING STUDENTS

FORM FA-406

_____

(College Name)

Sub-System V - Notification of Awards

Action	Performed by
Notify Financial Aid Applicants of Award Decisions: 1. Continuing Students: Mail Award Notification (Form FA-405) or Rejection Notice (Form FA-501) directly to students within five days of the decision. 2. New Applicants for Admission: Submit Award Notification (Form-405) or Rejection Notice (Form FA-501) to Admissions Director for Transmission to Applicants for Admission.	Financial Aid Director
Receive from students, signed copies of Award Notification Letter (Form FA-405) indicating definite committment to accept or refuse Award.	Financial Aid Director
Transmit to Business Officer, a copy of each signed Award Notification Letter that has been returned by the student.	Financial Aid Director
For all applicants indicated acceptance of Award, post permanent (ink) entry of the amount of award for both semesters on Financial Aid Master Card (Form FA-404).	Financial Aid Director
Post Applicant Check list and file Award Acceptance/ Rejection Notice for applicant indicating acceptance.	Financial Aid Director

_____

(College Name)

Sub-System V - Notification of Awards (Cont'd)

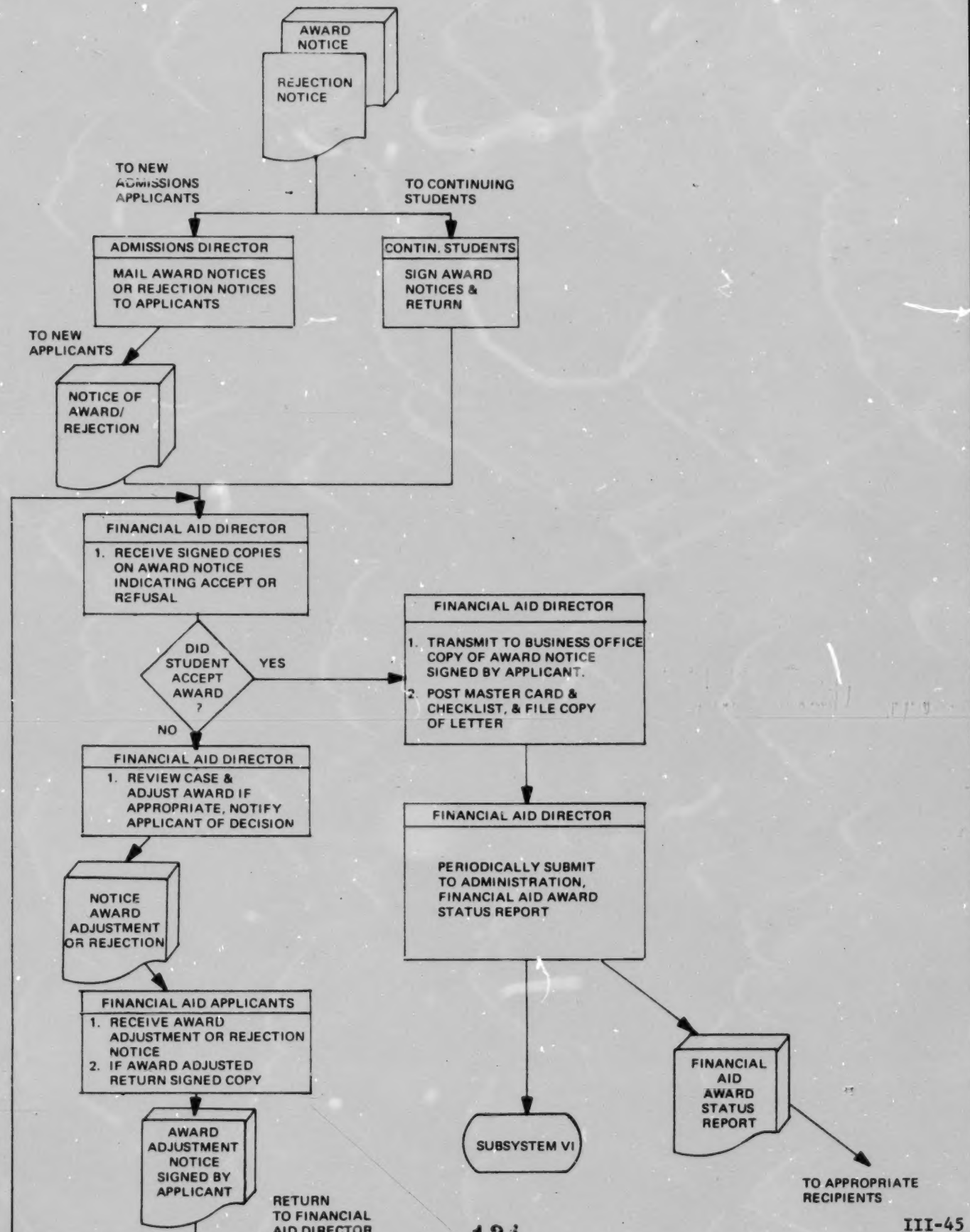
Action	Performed by
Review individual cases of students who rejected Awards. Ascertain fund availability and adjust Award if appropriate.	Financial Aid Director
Post adjusted Awards to Roster of Financial Aid Awards (Form FA-403).	Financial Aid Director
Notify all applicants of adjustments of Awards (Form FA-502)	Financial Aid Director
Receive from students, returned copy of adjusted Award letter indicating acceptance or rejection.	Financial Aid Director
Transmit to Business Officer, a copy of the returned adjusted Award letter.	
If applicant indicates "acceptance", post permanent entry of Award (source and amount for both semesters) on Financial Aid Master Card.	Financial Aid Director
Post notification of acceptance/rejection on Applicant checklist and file copy of letter.	Financial Aid Director

_____
(College Name)

Sub-System V - Notification of Awards (Cont'd)

Action	Performed by
Submit periodic Financial Aid Award Status Report (Form FA-503) to college administration, including: 1. President 2. Registrar 3. Dean of Students 4. Business Manager 5. Academic Dean	Financial Aid Director
Prepare financial aid award documents to be executed by applicant at registration time.	Financial Aid Director

SUBSYSTEM V Notification of Awards


AWARD NOTICE
REJECTION NOTICE
TO NEW ADMISSIONS APPLICANTS
TO CONTINUING STUDENTS
ADMISSIONS DIRECTOR
MAIL AWARD NOTICES OR REJECTION NOTICES TO APPLICANTS
CONTIN. STUDENTS
SIGN AWARD NOTICES & RETURN
TO NEW APPLICANTS
NOTICE OF AWARD/ REJECTION
FINANCIAL AID DIRECTOR
1. RECEIVE SIGNED COPIES ON AWARD NOTICE INDICATING ACCEPT OR REFUSAL
DID STUDENT ACCEPT AWARD ?
YES
NO
FINANCIAL AID DIRECTOR
1. TRANSMIT TO BUSINESS OFFICE COPY OF AWARD NOTICE SIGNED BY APPLICANT.
2. POST MASTER CARD & CHECKLIST, & FILE COPY OF LETTER
FINANCIAL AID DIRECTOR
1. REVIEW CASE & ADJUST AWARD IF APPROPRIATE, NOTIFY APPLICANT OF DECISION
NOTICE AWARD ADJUSTMENT OR REJECTION
FINANCIAL AID DIRECTOR
PERIODICALLY SUBMIT TO ADMINISTRATION, FINANCIAL AID AWARD STATUS REPORT
FINANCIAL AID APPLICANTS
1. RECEIVE AWARD ADJUSTMENT OR REJECTION NOTICE
2. IF AWARD ADJUSTED RETURN SIGNED COPY
AWARD ADJUSTMENT NOTICE SIGNED BY APPLICANT
RETURN TO FINANCIAL AID DIRECTOR
SUBSYSTEM VI
FINANCIAL AID AWARD STATUS REPORT
TO APPROPRIATE RECIPIENTS

_____ College

Dear

We regret to inform you that, after reviewing the Financial Need Analysis Report, and a copy of your [Parents' Confidential Statement/Family Financial Statement], furnished us by the [College Scholarship Service/American College Testing Program] it is the opinion of the Financial Aid Committee that you have not been able to present sufficient financial need justification and, therefore, are ineligible to receive financial assistance through this College.

You should not consider this decision as a reflection on your ability as a student or your personal character. We are most anxious to serve the financial needs of all of our students and would be most happy to review your case with you personally if you so desire. Please contact the financial aid office if you have further questions.

_____
Financial Aid Director

_____ College

We wish to thank you for bringing to our attention that the financial aid award made to you originally was insufficient to allow you to attend our College.

The Financial Aid Committee has again reviewed your request for financial aid . and wish to inform you that:

_____ You have not been able to present sufficient financial need justification for an increase in the amount of your award.

_____ Additional assistance will be considered if financial aid funds in excess of our estimates are received.

_____ Your award has been amended as indicated below

	Original Award	Revised Award
National Defense Student Loan	$	$
Economic Opportunity Grant		
College Work Study		
College Sponsored Campus Employment		
College Scholarship		
College Loan	_____	_____
	$_____	$_____

Please indicate your acceptance or rejection of this revised offer by signing, on the space indicated below, and returning the enclosed copy of this letter. For your convenience we are enclosing a self-addressed return envelope.

_____
Financial Aid Director

I accept_____ reject_____ the above indicated revised financial aid offer.

_____ _____
Signature of Applicant (date)

FINANCIAL AID AWARD STATUS REPORT

As of Date _____

Award Recipient	Number of Applications		Number of Awards					Total Amount of Awards		Character of Awards		
	Received	Processed	Offered	Accepted	Rejected	Cancelled	Adjusted	Offered	Accepted	Minimum	Maximum	Average
Freshman												
Special												
Transfer												
Continuing												

REMAINING BALANCES OF FUNDS BY CATEGORY OF AWARD

	NSDL	EOG	CWS	Upward Bound	Ed.Tal Search	Other Spec.Pgms.	State Loans	State Grants	College Funded			College Unfunded		Total
									Restrict	Unrestrict	Loans	Emplymnt	Gift & Aid	
Freshman														
Special														
Transfer														
Continuing														
Totals														

Form IA-503

_____
(College Name)

Sub-System VI - Reassessment of Fund Availability and Awards

Action	Performed by
Receive notification of funding approval for Federally funded financial aid programs. (Refer to Gantt Chart - Item #8 (Financial Aid) for time frame of Federal notification.)	Financial Aid Director
Receive notification from Registrar of present students who: a) are no longer students in good standing for academic reasons or disciplinary reasons. b) have not maintained required grade averages for continuation of Merit Scholarship awards.	Financial Aid Director
Receive notifications from Admissions Offices of applicants who have withdrawn acceptance of admission and financial aid or have failed to submit acceptance of admission by deadline date.	Financial Aid Director
Post cancellation of awards, as appropriate, to student or applicant's Financial Aid Master Card (Form FA-404) and Applicant Check List (Form FA-204) for those applicants who have declined to accept admission, will not return during the next term or are no longer eligible for continuation of financial aid.	Financial Aid Director

_____
(College Name)

Sub-System VI - Reassessment of Fund Availability and Awards

Action	Performed by
Post award cancellations to Roster of Financial Aid Awards (Form FA-403). Post new balances to Master Control Schedule (Form FA-406).	Financial Aid Director
Review and revise estimate of financial aid fund availability and amounts authorized to commit prior to funding in Financial Aid Allocation Plan (Form FA-103)	Financial Aid Director
Update Financial Aid Award Status Report (Form FA-503) to determine amounts committed to date and revised balance of funds remaining available for award. Update Master Control Schedule (Form FA-406)	Financial Aid Director
Determine amount, by category of funds available, to be retained for emergency awards, unanticipated needs at registration, or second semester award adjustments.	Financial Aid Director
Prepare Financial Aid reallocation plan (Form FA-601) for funds remaining, specifying: a) funds to be held in reserve for emergency, unanticipated need or second semester adjustments. b) adjustment of awards to applicants who have rejected awards because of inadequacy in meeting financial need.	Financial Aid Director

_____
(College Name)

Sub-System VI - Reassessment of Fund Availability and Awards (cont'd)

Action	Performed by
c) adjustment of awards to applicants who have accepted awards but where documented need has not been fully met.	
d) increasing average and upper limits of future awards to freshmen and transfer applicants for admission.	
Submit recommended Financial Aid Reallocation Plan to Financial Aid Committee.	Financial Aid Director
Review and revise Financial Aid Reallocation Plan, if necessary, at meeting with Financial Aid Committee.	Financial Aid Director and Financial Aid Committee
Review individual cases of applicants who	Financial Aid Director
1) Rejected award because of inadequacy in meeting financial need who were advised additional assistance would be considered if additional funds were made available to the College.	
2) Accepted award but award did not meet documented level of need.	
3) Were declared ineligible for continued Merit Scholarship assistance.	
Revise, if appropriate, financial aid awards for the above applicants.	Financial Aid Director

_____

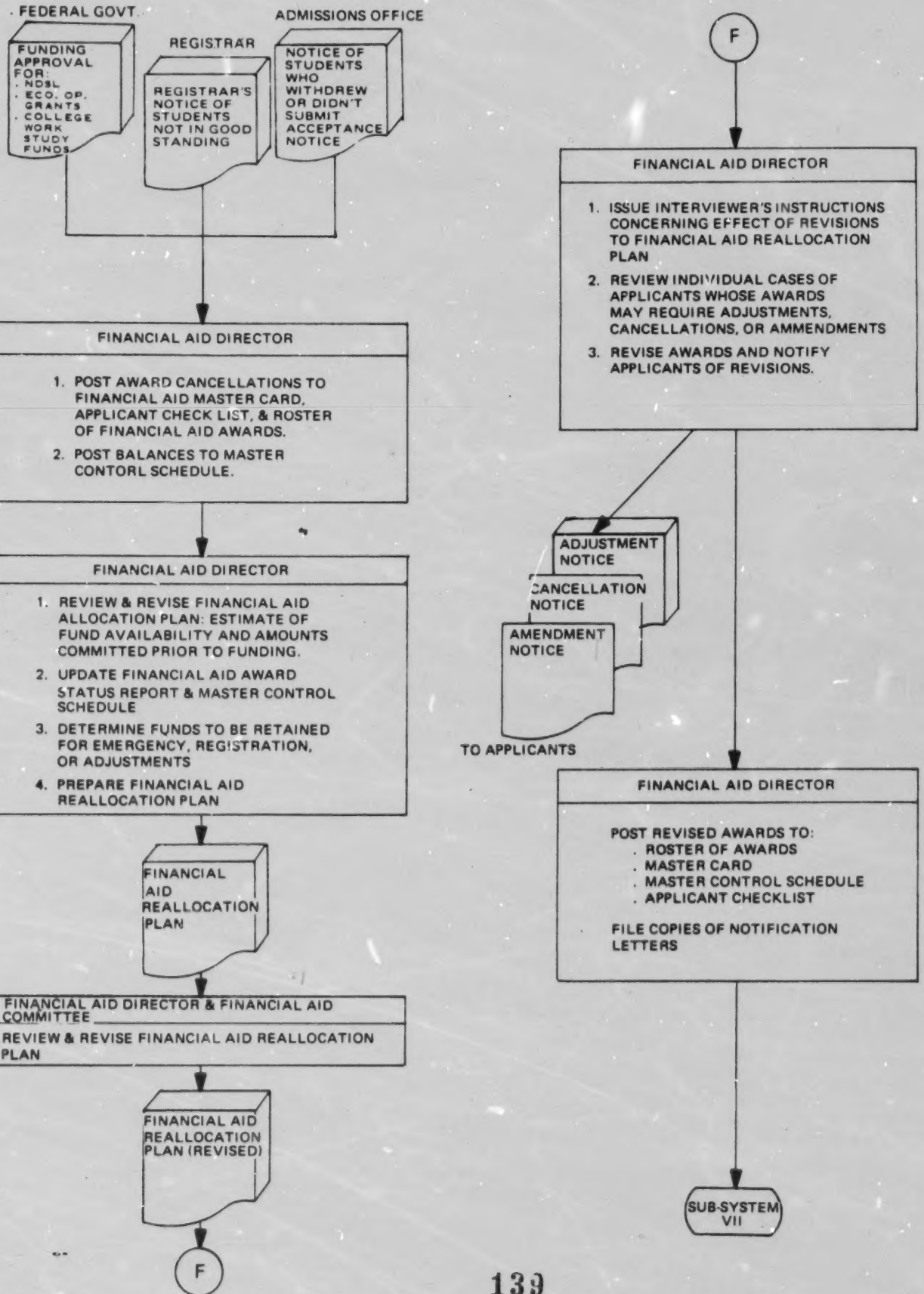
(College Name)

Sub-System VI - Reassessment of Fund Availability and Awards (cont'd)

Action	Performed by
Issue notification of adjusted award to applicants who have accepted previous award (Form FA-602).	Financial Aid Director
Issue notification of cancellation of awards to students no longer in good standing who had previously accepted award (Form FA-603).	Financial Aid Director
Issue notification of amendment of award to students who have not maintained academic grades required for eligibility to receive continued Merit Scholarship assistance (Form FA-603).	Financial Aid Director
Post award adjustments to Financial Aid Master Cards and to Roster of Financial Aid Awards.	Financial Aid Director
Post Roster entries to Master Control Schedule.	
Post Applicant Check List for actions covered by issuance of notification letters cancelling or adjusting awards and file copies of letters in individual's folder.	Financial Aid Director

SUB-SYSTEM VI

Reassessment of Fund Availability and Awards


FEDERAL GOVT.
FUNDING APPROVAL FOR:
. NDSL
. ECO. OP. GRANTS
. COLLEGE WORK STUDY FUNDS
REGISTRAR
REGISTRAR'S NOTICE OF STUDENTS NOT IN GOOD STANDING
ADMISSIONS OFFICE
NOTICE OF STUDENTS WHO WITHDREW OR DIDN'T SUBMIT ACCEPTANCE NOTICE
FINANCIAL AID DIRECTOR
1. POST AWARD CANCELLATIONS TO FINANCIAL AID MASTER CARD, APPLICANT CHECK LIST, & ROSTER OF FINANCIAL AID AWARDS.
2. POST BALANCES TO MASTER CONTORL SCHEDULE.
FINANCIAL AID DIRECTOR
1. REVIEW & REVISE FINANCIAL AID ALLOCATION PLAN: ESTIMATE OF FUND AVAILABILITY AND AMOUNTS COMMITTED PRIOR TO FUNDING.
2. UPDATE FINANCIAL AID AWARD STATUS REPORT & MASTER CONTROL SCHEDULE
3. DETERMINE FUNDS TO BE RETAINED FOR EMERGENCY, REGISTRATION, OR ADJUSTMENTS
4. PREPARE FINANCIAL AID REALLOCATION PLAN
FINANCIAL AID REALLOCATION PLAN
FINANCIAL AID DIRECTOR & FINANCIAL AID COMMITTEE
REVIEW & REVISE FINANCIAL AID REALLOCATION PLAN
FINANCIAL AID REALLOCATION PLAN (REVISED)
F
F
FINANCIAL AID DIRECTOR
1. ISSUE INTERVIEWER'S INSTRUCTIONS CONCERNING EFFECT OF REVISIONS TO FINANCIAL AID REALLOCATION PLAN
2. REVIEW INDIVIDUAL CASES OF APPLICANTS WHOSE AWARDS MAY REQUIRE ADJUSTMENTS, CANCELLATIONS, OR AMMENDMENTS
3. REVISE AWARDS AND NOTIFY APPLICANTS OF REVISIONS.
ADJUSTMENT NOTICE
CANCELLATION NOTICE
AMENDMENT NOTICE
TO APPLICANTS
FINANCIAL AID DIRECTOR
POST REVISED AWARDS TO:
. ROSTER OF AWARDS
. MASTER CARD
. MASTER CONTROL SCHEDULE
. APPLICANT CHECKLIST
FILE COPIES OF NOTIFICATION LETTERS
SUB-SYSTEM VII

_____ COLLEGE

FINANCIAL AID REALLOCATION PLAN FOR FISCAL YEAR BEGINNING_____

SOURCE OF FUNDS		REVISED FUND AVAIL ABILITY	AWARDED TO DATE				BALANCE AVAIL ABLE FOR AWARDS	AMOUNT TO RETAIN FOR EMER GENCIES	BALANCE TO BE COMMIT TED	PLANNED REALLOCATION				
			CONTINUING STUDENTS	FRESHMEN	TRANS FERS	TOTAL ALL STUDENTS				ADJUSTED AWARDS TO		FUTURE AWARDS		
										ACCEPTED	REJECTED	CONTINUING	FRESHMEN	TRANSFERS
FEDERAL	N.D.S/L	$	$	$	$	$	$	$	$	$	$	$	$	$
	NSDL (NURSING)													
	EOG													
	CWS													
	EDUC. TALENT SEARCH													
	UPWARD BOUND													
	OTHER SPECIAL PROGRAMS													
	TOTAL	$	$	$	$	$	$	$	$	$	$	$	$	$
STATE	GRANTS	$	$	$	$	$	$	$	$	$	$	$	$	$
	LOANS													
	TOTAL	$	$	$	$	$	$	$	$	$	$	$	$	$
COLLEGE FUNDED	RESTRICTED													
	ENDOWMENT	$	$	$	$	$	$	$	$	$	$	$	$	$
	GIFTS & GRANTS													
	UNRESTRICTED													
	ENDOWMENT													
	GIFTS & GRANTS													
	LOAN FUNDS													
UNFUNDED	GRANTS IN AID													
	CAMPUS EMPLOYMENT													
	TOTAL	$	$	$	$	$	$	$	$	$	$	$	$	$
TOTAL FINANCIAL AID		$	$	$	$	$	$	$	$	$	$	$	$	$

_____ College

The College has been fortunate to receive a larger allocation of financial aid funds than was anticipated. As a result the Financial Aid Committee has revised its previous awards.

We are pleased to inform you that your award has been amended as indicated below:

Type of Assistance Offered	Original Award	Revised Award
National Defense Student Loan	$	$
Economic Opportunity Grant		
College Work Study		
College Sponsored Campus Employment		
College Scholarship		
College Loan	_____	_____
	$_____	$_____

Even though you have already indicated the acceptance of our original award offer, it is necessary for you to signify your acceptance of this revised award by signing and returning the enclosed copy of this letter.

_____
Financial Aid Director

I accept_____ reject_____ the above indicated revised financial aid offer.

_____ _____
Signature of Applicant (date)

_____ College

We have been notified by the Registrar that

_____ you are no longer a student in good standing.

_____ you have not maintained the academic grades required for continued eligibility for your merit scholarship award.

It is, therefore, necessary for us to amend the financial aid award previously granted as follows:

Type of Aid	Amount Awarded	Amended
National Defense Student Loan	$	$
Economic Opportunity Grant		
College Work Study		
College Sponsored Campus Employment		
College Scholarship		
College Loan		
Total	$	$

We regret the necessity of notifying you of the need to amend your award.

_____
Financial Aid Director

_____
(College Name)

Sub-System VII - Registration and Post Registration Processes

Action	Performed by
File executed copies of Loyalty Oath in student's financial aid file.	Financial Aid Director
Post cancellations to Financial Aid Master Card for all applicants who failed to register.	Financial Aid Director
Summarize financial aid award cancellations on Roster and post to Master Control Schedule (Form FA-406).	Financial Aid Director
Interview registrants who have questions about financial aid, including cases of changed circumstances requiring additional assistance and first-time financial aid applicants.	Financial Aid Director
Determine fund availability.	Financial Aid Director
Have those who had not previously applied for financial aid complete Financial Aid Application Card.	Financial Aid Director
Determine conditional awards for applicants who had not previously applied and adjustments, if any, to registrants requiring additional assistance.	Financial Aid Director

_____
(College Name)

Sub-System VII - Registration and Post Registration Processes (Cont'd)

Action	Performed by
Prepare award amendment (Form FA-702) or conditional award notification (Form FA-701) to be executed by applicant.	Financial Aid Director
Transmit copies of the above conditional award notices and amendments to the Business Office.	
Post award amendment or conditional award to Financial Aid Master Card.	Financial Aid Director
File new Applications for Financial Aid, and Financial Aid Master Card in Applicant Folder.	Financial Aid Director
Issue Parents' Confidential Statements or Family Financial Statements to students who had not previously applied for financial aid and reiterate that awards are conditioning pending fund availability and receipt of a copy of College Scholarship Service or American College Testing Forms, or Notarized Form completed by parent/guardian.	Financial Aid Director
Receive Parents' Confidential Statement or Family Financial Statement from College Scholarship Service, American College Testing Program, or Notarized Form completed by parent/guardian.	Financial Aid Director

_____
(College Name)

Sub-System VII - Registration and Post Registration Processes (Cont'd)

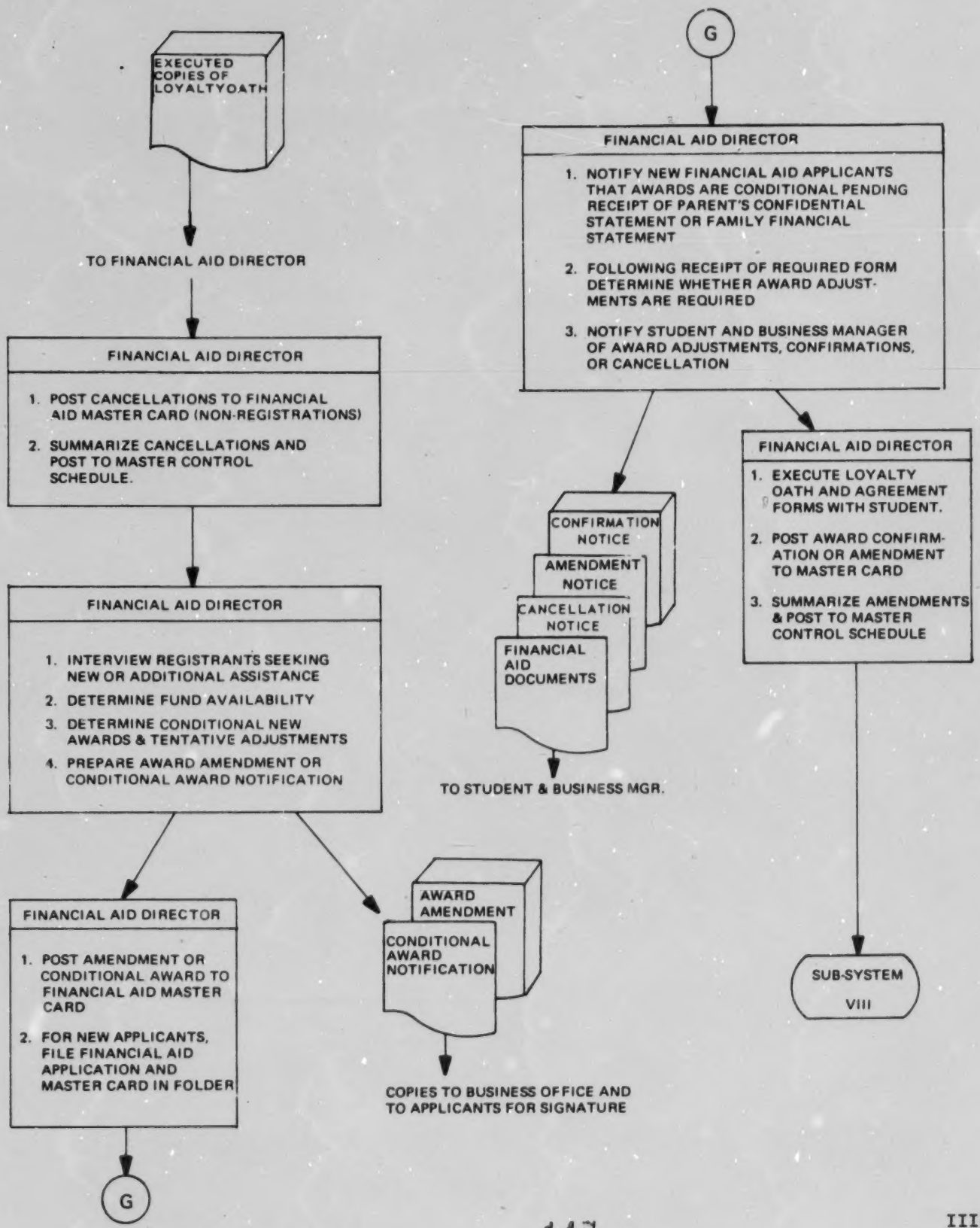
Action	Performed by
Determine fund availability and whether adjustment of conditional award is required.	Financial Aid Director
If adjustment is not necessary, or conditional award is to be decreased, notify student and Business Manager of final award determination (Form FA-704).	Financial Aid Director
If upward adjustment is necessary, check fund availability and notify student and Business Manager of final award determination (Form FA-704).	Financial Aid Director
Execute with students, who had not previously signed, signing of loyalty oath and all necessary financial aid agreement forms. - Forms - FA-703/FA-704 or FA-705 (This process may be accomplished at the time of student academic registration).	Financial Aid Director
Advise student and Business Manager of cancellation of tentative award if Parent's Confidential Statement/ Family Financial Statement is not received by specified date (Form FA-705).	Financial Aid Director
Post confirmation, amendment or cancellation of award to Financial Master Card.	Financial Aid Director

(College Name)

Sub-System VII - Registration and Post Registration Processes (Cont'd)

Action	Performed by
Summarize all financial aid awards, amendments and cancellations occuring during and after registration and post to Master Control Schedule (Form FA-406).	Financial Aid Director

SUB-SYSTEM VII. Registration and Post Registration Processes


EXECUTED COPIES OF LOYALTYOATH
TO FINANCIAL AID DIRECTOR
FINANCIAL AID DIRECTOR
1. POST CANCELLATIONS TO FINANCIAL AID MASTER CARD (NON-REGISTRATIONS)
2. SUMMARIZE CANCELLATIONS AND POST TO MASTER CONTROL SCHEDULE.
FINANCIAL AID DIRECTOR
1. INTERVIEW REGISTRANTS SEEKING NEW OR ADDITIONAL ASSISTANCE
2. DETERMINE FUND AVAILABILITY
3. DETERMINE CONDITIONAL NEW AWARDS & TENTATIVE ADJUSTMENTS
4. PREPARE AWARD AMENDMENT OR CONDITIONAL AWARD NOTIFICATION
FINANCIAL AID DIRECTOR
1. POST AMENDMENT OR CONDITIONAL AWARD TO FINANCIAL AID MASTER CARD
2. FOR NEW APPLICANTS, FILE FINANCIAL AID APPLICATION AND MASTER CARD IN FOLDER
G
AWARD AMENDMENT
CONDITIONAL AWARD NOTIFICATION
COPIES TO BUSINESS OFFICE AND TO APPLICANTS FOR SIGNATURE
G
FINANCIAL AID DIRECTOR
1. NOTIFY NEW FINANCIAL AID APPLICANTS THAT AWARDS ARE CONDITIONAL PENDING RECEIPT OF PARENT'S CONFIDENTIAL STATEMENT OR FAMILY FINANCIAL STATEMENT
2. FOLLOWING RECEIPT OF REQUIRED FORM DETERMINE WHETHER AWARD ADJUSTMENTS ARE REQUIRED
3. NOTIFY STUDENT AND BUSINESS MANAGER OF AWARD ADJUSTMENTS, CONFIRMATIONS, OR CANCELLATION
CONFIRMATION NOTICE
AMENDMENT NOTICE
CANCELLATION NOTICE
FINANCIAL AID DOCUMENTS
TO STUDENT & BUSINESS MGR.
FINANCIAL AID DIRECTOR
1. EXECUTE LOYALTY OATH AND AGREEMENT FORMS WITH STUDENT.
2. POST AWARD CONFIRMATION OR AMENDMENT TO MASTER CARD
3. SUMMARIZE AMENDMENTS & POST TO MASTER CONTROL SCHEDULE
SUB-SYSTEM VIII

_____College

We have considered your request for financial assistance presented without supporting documentation at registration time.

In order to assist you, pending verification of financial need, we are prepared to offer the following conditional award. This conditional offer is made subject to your furnishing our Financial Aid Director with a copy of your parents' Confidential Statement or Family Financial Statement by _____(date)_____.

Type of Aid	Amount Awarded
National Defense Student Loan	$_____
Economic Opportunity Grant	_____
College Work Study	_____
College Sponsored Campus Employment	_____
College Scholarship	_____
College Loan	_____
	$_____

Upon receipt of your (Parents' Confidential Statement or Family Financial Statement) we will either confirm or adjust your conditional award depending on our evaluation of your need for financial assistance and the availability of funds. At this time you will be notified of the final award and requested to execute the necessary financial aid agreement documents.

If it is necessary to reduce the amount of your conditional award, you will be required to make arrangements with the Business Officer to pay the revised balance due the College.

You have indicated your acceptance of the requirements concerning this conditional award by your signature shown below.

_____
Financial Aid Director

I accept the above indicated conditional financial aid award and the conditions stipulated in reference thereto.

_____ _____
(Signature of Applicant) (date)

_____ College

Your request for reconsideration of the financial aid award offered you has been considered in light of the additional information you have brought to our attention.

We are pleased to inform you that your financial aid award has been amended as follows:

Type of Aid	Original Award	Revised Award
National Defense Student Loan	$	$
Economic Opportunity Grant		
College Work Study		
College Sponsored Campus Employment		
College Scholarship		
College Loan		
Others		
Total	$	$

It is now required that you report immediately to the financial aid office in order to execute the necessary agreement forms.

_____
Financial Aid Director

_____College

We have received from your parent/guardian a copy of his/her (Parents' Confidential Statement or Family Financial Statement). We have reviewed our conditional financial aid award made at the time of registration and find that it is consistent with the financial need justified.

We are, therefore, pleased to confirm our conditional award and are so advising the Business Manager by copy of this letter.

You are hereby notified to report to the financial aid office in order to execute the required financial aid agreements.

_____
Financial Aid Director

_____College

We have received from your parent/guardian a copy of his/her (Parents' Confidential Statement or Family Financial Statement).

We have reviewed our conditional financial aid award made at the time of registration and find that the level of financial need justified is (greater/less) than our conditional award. We have, therefore, amended our conditional award as follows:

	Tentative Award	Final Award
National Defense Student Loan	$	$
Economic Opportunity Grant		
College Work Study		
College Sponsored Campus Employment		
College Scholarship		
College Loan		
Total	$	$

We are by copy of this letter notifying the Business Manager of the amendment to our conditional offer of financial aid. If the amendment is a reduction of our conditional offer, you must, of course, also make arrangement with the Business Office to pay the additional balance due the college.

As soon as possible you should report to the financial aid office in order to execute the required agreement forms.

_____
Financial Aid Director

_____ College

At the time of registration, we made a conditional offer to provide you with financial assistance, even though you had not previously applied and furnished the documentation normally required for proper evaluation of your need for such assistance.

At that time you were advised that a copy of your parent's/guardian's (Confidential Statement/Family Financial Statement) would have to be submitted by _____(date)_____ in order for us to be able to confirm or amend this offer.

Inasmuch as we have not yet received the required copy of your parent's (Confidential Statement/Family Financial Statement) we regret to inform you that we must cancel our conditional offer of award.

We are notifying the Business Manager of the cancellation of your conditional financial aid award. You must now make the necessary arrangements with him for the payment of the charges due the College.

_____
Financial Aid Director

_____
(College Name)

Sub-System VIII - Student Employment

Action	Performed by
Review Operating Budget to determine number of student employment positions authorized for each Department.	Financial Aid Director
Determine number of off-campus positions available for College Work Study Assignment.	Financial Aid Director
Determine if number of positions authorized in the Operating Budget and off-campus positions available are sufficient to provide employment for number of students awarded College Work Study or College Sponsored Campus Employment as part of their financial aid.	Financial Aid Director
If no, request College operating departments to advise Financial Aid Office of ability to use additional student employment (Form FA-801).	Financial Aid Director
Receive responses from operating departments and determine number and nature of additional student employment positions to be added to Operating Budget.	Financial Aid Director
Initiate Budget Amendment request for positions to be added. Increase operating costs to be offset by additional College Work Study income.	Financial Aid Director

_____
(College Name)

Sub-System VIII - Student Employment (Cont'd)

Action	Performed by
Request college operating departments to provide special job requirements, if any, for positions authorized, hours of employment required and preference for reassignment of students employed last year (Form FA-802).	Financial Aid Director
Post positions authorized to Student Employment Control Schedule (Form FA-803).	Financial Aid Director
Assign continuing students to positions designated by departmental requests.	Financial Aid Director
Interview new students and continuing students not assigned positions by department request to determine positions for which they are qualified and their job preference.	Financial Aid Director
Refer students to appropriate supervisor for job interview (Form FA- 804).	Financial Aid Director
Receive decision to employ from supervisor.	Financial Aid Director
If no, refer student to other supervisors until agreement to employ is obtained.	Financial Aid Director
If yes, execute employment agreement (Form FA-805).	Financial Aid Director

_____
(College Name)

Sub-System VIII - Student Employment (Cont'd)

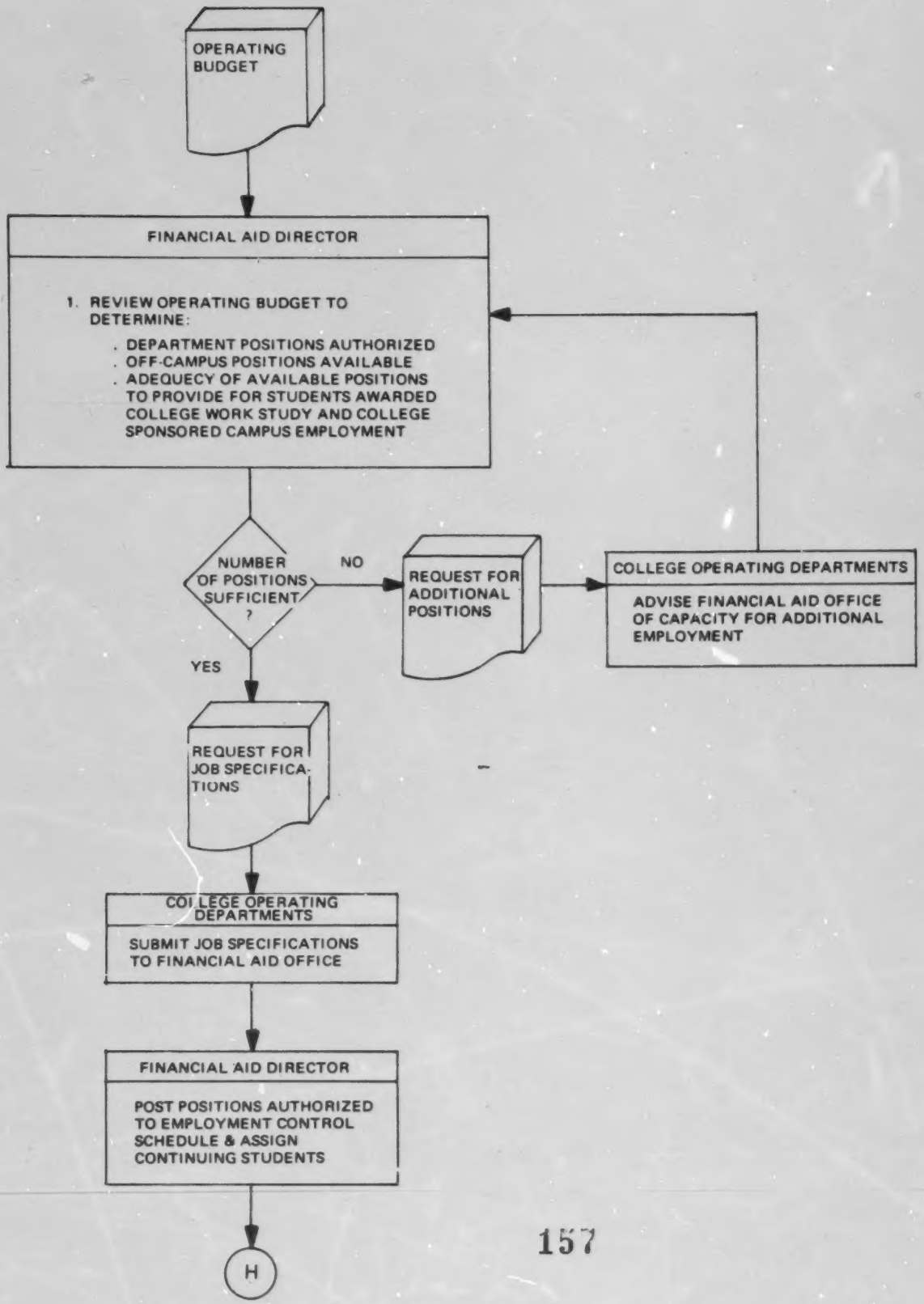
Action	Performed by
Distribute copies of employment agreement to supervisor and Payroll Department.	Financial Aid Director
Post Applicant Check List in students financial aid folder and file copy of employment agreement.	Financial Aid Director
Receive monthly time report from departmental supervisors (Form FA-806).	Financial Aid Director
Prepare monthly gross earning report after verifying that hours worked as reported by supervisors are in accordance with employment agreement and applicable regulations.	Financial Aid Director
Transmit monthly gross earnings report to Payroll Department.	Financial Aid Director
Receive notification of termination of student employment from supervisor (Form FA-808).	Financial Aid Director
Notify payroll of termination of student employment with confirmation copy to student and supervisor (Form FA-809).	Financial Aid Director
File copies of notification of termination and confirmation of termination notification in student's file folder.	Financial Aid Director

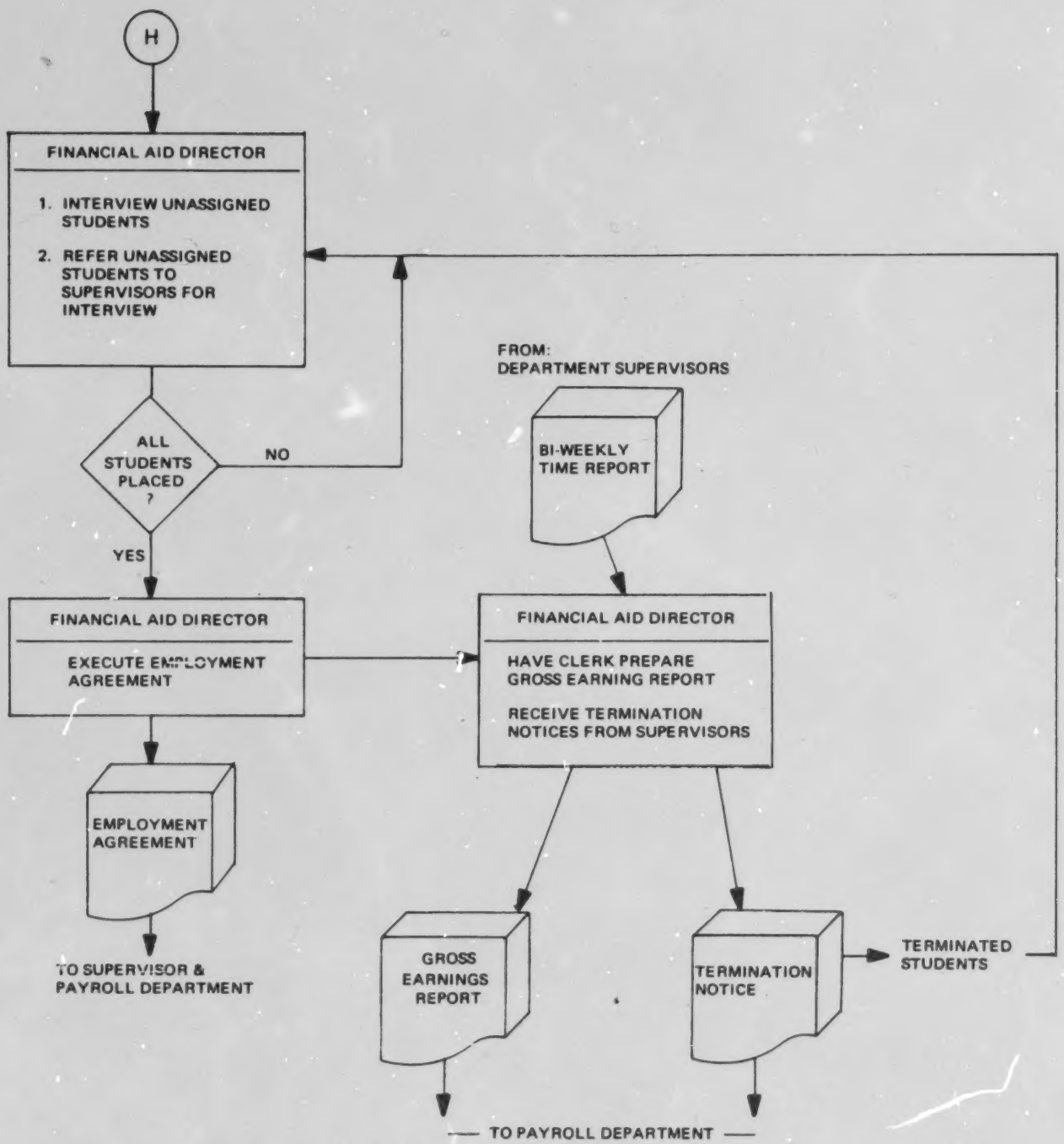
_____
(College Name)

Sub-System VIII - Student Employment (Cont'd)

Action	Performed by
Interview student to determine other potential areas of student employment for which he/she is qualified.	Financial Aid Director
Determine student employment positions available and reassign student following same procedures as for initial assignment.	Financial Aid Director

SUB-SYSTEM VIII. Student Employment


OPERATING BUDGET
FINANCIAL AID DIRECTOR
1. REVIEW OPERATING BUDGET TO DETERMINE:
. DEPARTMENT POSITIONS AUTHORIZED
. OFF-CAMPUS POSITIONS AVAILABLE
. ADEQUECY OF AVAILABLE POSITIONS TO PROVIDE FOR STUDENTS AWARDED COLLEGE WORK STUDY AND COLLEGE SPONSORED CAMPUS EMPLOYMENT
NUMBER OF POSITIONS SUFFICIENT ?
NO
REQUEST FOR ADDITIONAL POSITIONS
COLLEGE OPERATING DEPARTMENTS
ADVISE FINANCIAL AID OFFICE OF CAPACITY FOR ADDITIONAL EMPLOYMENT
YES
REQUEST FOR JOB SPECIFICATIONS
COLLEGE OPERATING DEPARTMENTS
SUBMIT JOB SPECIFICATIONS TO FINANCIAL AID OFFICE
FINANCIAL AID DIRECTOR
POST POSITIONS AUTHORIZED TO EMPLOYMENT CONTROL SCHEDULE & ASSIGN CONTINUING STUDENTS
H


H
FINANCIAL AID DIRECTOR
1. INTERVIEW UNASSIGNED STUDENTS
2. REFER UNASSIGNED STUDENTS TO SUPERVISORS FOR INTERVIEW
ALL STUDENTS PLACED ?
NO
YES
FROM: DEPARTMENT SUPERVISORS
BI-WEEKLY TIME REPORT
FINANCIAL AID DIRECTOR
EXECUTE EMPLOYMENT AGREEMENT
FINANCIAL AID DIRECTOR
HAVE CLERK PREPARE GROSS EARNING REPORT
RECEIVE TERMINATION NOTICES FROM SUPERVISORS
EMPLOYMENT AGREEMENT
TO SUPERVISOR & PAYROLL DEPARTMENT
GROSS EARNINGS REPORT
TERMINATION NOTICE
TERMINATED STUDENTS
TO PAYROLL DEPARTMENT

_____College

To: All Administrators and Department Heads

From: Financial Aid Director

Subject: Student Employment

1. A comparison of the number of student employment job opportunities available with the number of students offered employment as a part of their financial aid reveals the need to find employment opportunities for _____additional students.

2. If you find you can utilize additional student help, please indicate the nature of additional students you can employ.

3. Inasmuch as we must find employment opportunities for all students offered employment, your early response is requested.

_____
Financial Aid Director

_____ College

To:

From: Financial Aid Director

Subject: Student Employment

1. The Operating Budget for your department shows that the following student employment positions have been authorized for the current fiscal year.

Position	Rate of Pay	Number of Student Employees Authorized
1.		
2.		
3.		
4.		
5.		

2. In order to assist us in providing you with student employees who meet your requirements as nearly as possible, please advise this office of the following for each position authorized:

1. Special skills, if any, required by the position.
2. Hours of employment required by days of weeks and hours of each day.
3. Name of student you desire assigned, if known.
4. Name of individual responsible for supervision.

_____
Financial Aid Director

_____ COLLEGE

STUDENTS EMPLOYMENT CONTROL SCHEDULE FOR FISCAL YEAR _____

POSITIONS AUTHORIZED	SUPERVISORS	DAILY STUDENT WORK PERIODS							NAME OF STUDENT EMPLOYED	ASSIGNED		SOCIAL SECURITY NUMBER	CLASS	COMMENTS
		S	M	T	W	T	F	S		NO OF HOUR	RATE OF PAY			
DEPARTMENT														
1														
2														
3														
4														
5														
DEPARTMENT														
1														
2														
3														
4														
5														
6														
7														
DEPARTMENT														
1														
2														
3														
DEPARTMENT														
1														
2														
3														
4														
5														
6														

FA-803

Form FA-804

_____ College

_____ (Student's Name) _____ is hereby referred to you to be interviewed to fill the position of _____ in your department.

After you have interviewed the applicant, return this form to the Financial Aid Office indicating your employment decision in the appropriate space indicated below:

_____ Not authorized to hire

_____ Authorized to hire, hours of employment assigned are:

Monday	From	_____	to	_____
Tuesday	From	_____	to	_____
Wednesday	From	_____	to	_____
Thursday	From	_____	to	_____
Friday	From	_____	to	_____
Saturday	From	_____	to	_____
Sunday	From	_____	to	_____

Should report for work beginning _____
(date)

_____
Signature of Supervisor

_____
(date)

_____ College
Student Employment Agreement

_____
(date)

_____
Student's Name

_____
Social Security Number

Your employment as _____(Position Title)_____, in _____ department, effective _____(date)_____, under the supervision of _____(Name of Supervisor)_____, at $_____ per hour, is hereby confirmed.

Your work schedule will be as follows:

Monday	From _____	to _____
Tuesday	From _____	to _____
Wednesday	From _____	to _____
Thursday	From _____	to _____
Friday	From _____	to _____
Saturday	From _____	to _____
Sunday	From _____	to _____

You will submit a time sheet showing the hours actually worked each day to your supervisor each month. Your payroll check will be issued by the Business Office.

By signing this agreement accepting employment as stipulated above, you agree to abide by the rules and regulations of the College and to diligently perform the duties assigned to you.

_____
Financial Aid Director

I accept the employment set forth above

_____ _____
(Signature of Student) (date)

Name of Student _____ Department or Agency _____ Project _____

STUDENT EMPLOYMENT TIME RECORD

Date Week Ended	S	M	T	W	T	F	S	Total
Week 1								
Week 2								
Week 3								
Week 4								
Week 5								

I hereby certify that this time card is a true statement of the hours worked by this student and that the work assigned has been performed in a satisfactory manner.

_____
Signature of Project Supervisor

_____
Date

Although the exhibit shows a student time card for an institution using a monthly payroll, it may be adapted by institutions with weekly or bi-weekly payroll periods. Since the form serves as a cumulative record of the total numberof hours a student has worked each week, totals may be posted directly to the payroll voucher.

_____ COLLEGE

MONTHLY GROSS EARNINGS FOR STUDENTS IN WORK PROGRAMS FOR PERIOD ENDING

NAME LAST – FIRST – INITIAL	SOCIAL SECURITY NUMBER	POSITION	EMPLOYED UNDER		DEPARTMENT	NUMBERS OF HOURS WORKED	HOURLY RATE OF PAY	GROSS EARNINGS
			C.W.S.	COLLEGE				

163

DATE_____ FINANCIAL AID DIRECTOR

FA - 807

TTT-79

Form FA-808

_____ College

To: Director of Financial Aid

From: (Departmental Supervisor)

Subject: Termination of Student Employment

1. You are hereby notified that (Student's name), whose Social Security Number is _____, has been notified that his employment as (position) in (department), has been terminated as of (date), and has been instructed to report to the Financial Aid office for interview and reassignment.

2. You are hereby requested to provide me with a copy of your confirmation of this action and notification to the payroll department.

3. The reason for this action is _____

_____

_____

_____

_____

_____

_____
(Signature of Supervisor)

_____ College

This letter confirms your supervisor's, _____(Supervisor's Name)_____, notification of the termination of your employment as _____(position)_____, in _____(department)_____, effective as of _____(date)_____.

By copy of this letter, we are notifying the payroll department and your supervisor of our confirmation of such termination of employment.

Please report to this office as soon as possible so that we may see what arrangements can be made for your re-employment in another department of the College.

_____
Financial Aid Director

SECTION IV

REGISTRAR

The effectiveness of the registration and records system can have a significant influence on student and faculty attitudes toward the college and contribute to the efficient utilization of academic facilities and the evaluation of instructional processes. Thus, the Registrar plays an important role in helping the College to achieve its planning objectives.

The registration and recording procedures established by the Registrar and the compentence with which they are carried out can serve in many ways to reflect the administration's attitude toward students. Therefore, it is important to establish procedures which are efficient, effective and just. At the same time, the Registrar should be sensitive to the extent and nature of student participation in these processes. The registration procedures, for example, are designed so that the responsible student who makes a serious selection of courses and pays his fees in advance has a minimum of actions to accomplish at registration.

In considering the preparation of the Master Schedule, we assumed that departments should have the right to specify which faculty members would teach the courses or sections offered and to indicate their preference for the time and place for class meetings. However, the utilization of academic space is considered to be a function of the Registrar who would have the authority to make adjustments to class meetings, time and places subject to the approval of the Academic Dean. In preparing the Recommended Master Schedule, the Registrar would attempt to accede to departmental requests for time and space where practical. The Academic Dean would be responsible for resolving conflicts between departmental desires and effective space utilization.

In designing the registration procedures, we concluded that pre-registration of both new and continuing students was desirable because:

1. In most cases freshmen and sophomores would be following a "General" or "Core" curriculum with few electives.

2. Mail registration for new students would be consistent with the "keep in touch" policy incorporated in the admissions and financial aid procedures and might increase the percentage of matriculants.

3. Pre-registration would permit student sectioning and advance fee billing to occur over an extended time period, thereby:

   a. reducing the need for "crash" programs during the registration period which disrupt normal activities;

   b. enhancing the probability that the student will be prepared to settle the balance due the college, thus easing student account receivable collection problems.

   c. providing better data on which to base sectioning decisions.

Pre-registration for freshmen students is perhaps best handled during a freshmen orientation period, assuming the institution conducts one or more such sessions. Freshmen advising can often be accomplished on a group basis and freshmen course requests can be processed while advisors are on hand to counsel students in the event that initial course selections must be modified.

To complete his registration, each student must appear on campus to fill out his Student Information Card and pick up his class cards, even if he has pre-registered and paid his fees in advance. Other students who hold incomplete schedules or who have not pre-registered must also appear and accomplish additional steps necessary to complete registration. To facilitate these processes, consideration should be given to establishing a registration "arena" in a central location (perhaps a gymnasium or large classroom). The arena would provide stations at which students could turn in course requests, complete financial aid forms, pay fees, prepare Student Information Cards, and receive class cards without having to make trips to several offices around campus. Properly managed, an arena-type

registration can produce efficiencies for both the student and the administration. Furthermore, it can help to avoid the turmoil often created in administration offices when students arrive in large numbers to pay fees, collect class cards, and so on.

It has been assumed that the student will plan his course selections over the entire span of his degree program, although only registering for classes one term at a time. We believe there is merit in encouraging students to plan their degree programs on a comprehensive basis and the forms suggested for use in advising enhance the opportunity to do so.

Finally, the highly repetitive nature of the data recording and processing conducted within the office of the Registrar provides many opportunities for the use of punch card data processing equipment of modest cost. As we indicated in Section One, procedures have been designed to operate without the benefit of this equipment, but several opportunities for adaptation exist and could be incorporated into these procedures with only minor modifications.

_____
(College Name)

Sub-System I - Preparation of the Master Schedule

Action	Performed by
Issue Course Information Sheets to department chairman (Form R-101) and accompanying transmittal letter (Form R-102).	Academic Dean
Review Course and Project Data (Form 113 of the Planning, Budgeting, Accounting Manual) submitted to Academic Dean during Planning cycle.	Academic Department Chairman
Prepare Course Information Sheet (Form R-101) listing all sections of all courses to be offered by the department during the upcoming term.	Academic Department Chairman
Review Course Information Sheets as they are received from the departments. Check Course Information Sheet against an approved course card file, check department estimates of enrollments against any projections made by the Registrar; verify adequacy of number of sections requested employing minimum and maximum class enrollment limit policy established by the Academic Dean.	Registrar
When Course Information Sheets have been received from all departments, begin assigning times and rooms in the following order	Registrar

_____
(College Name)

Sub-System I - Preparation of the Master Schedule (Continued)

Action	Performed by
1) Laboratory courses 2) Single Section courses 3) Multi-Section courses with particular regard to curricular relationships at the upper division level. (To assist the Registrar during the Scheduling process, a large board providing a matrix made up of columns for each day of the week and rows for each time period of the day may be constructed. Each cell of the matrix would provide a box within it for each room available for scheduling, By recording section data; i.e., course number, section number, and instructor name, within the boxes, the Registrar would be able to review the entire master schedule at a glance. A sample cell appears as Form R-103).	
Prepare sample student schedules representing several patterns of course selections and test the efficacy of the schedule.	Registrar
Review the master schedule for possible faculty schedule conflicts.	Registrar
Post course and section numbers, instructor names (if indicated on course information sheet) to appropriate day and period boxes of Room Utilization Cards (Form-104).	Registrar

_____
(College Name)

Sub-System I - Preparation of the Master Schedule (Continued)

Action	Performed by
Record section numbers, building and room assignments, and time and day assignments on Course Information Sheets.	Registrar
Review building and room, and time and day assignments, on Course Information Sheets.	Academic Dean
If modifications are necessary, return to Registrar for adjustment and resubmission.	Academic Dean
Distribute one copy of the Course Information Sheets to the academic departments.	Registrar
Arrange for and supervise preparation of the printed master schedule.	Registrar
Prepare class cards (Form R-105) for the upcoming academic term. Preprint or emboss department, course number, section number, descriptive title, and credit hours on each card. Prepare sufficient cards to provide for the class limit and additional cards to provide for change of program or mutilated cards. (Class cards for courses which carry special fees should be prepared on stock of a different color than non-fee courses. In addition, any special fees should be printed on the cards if they vary from course to course).	Registrar

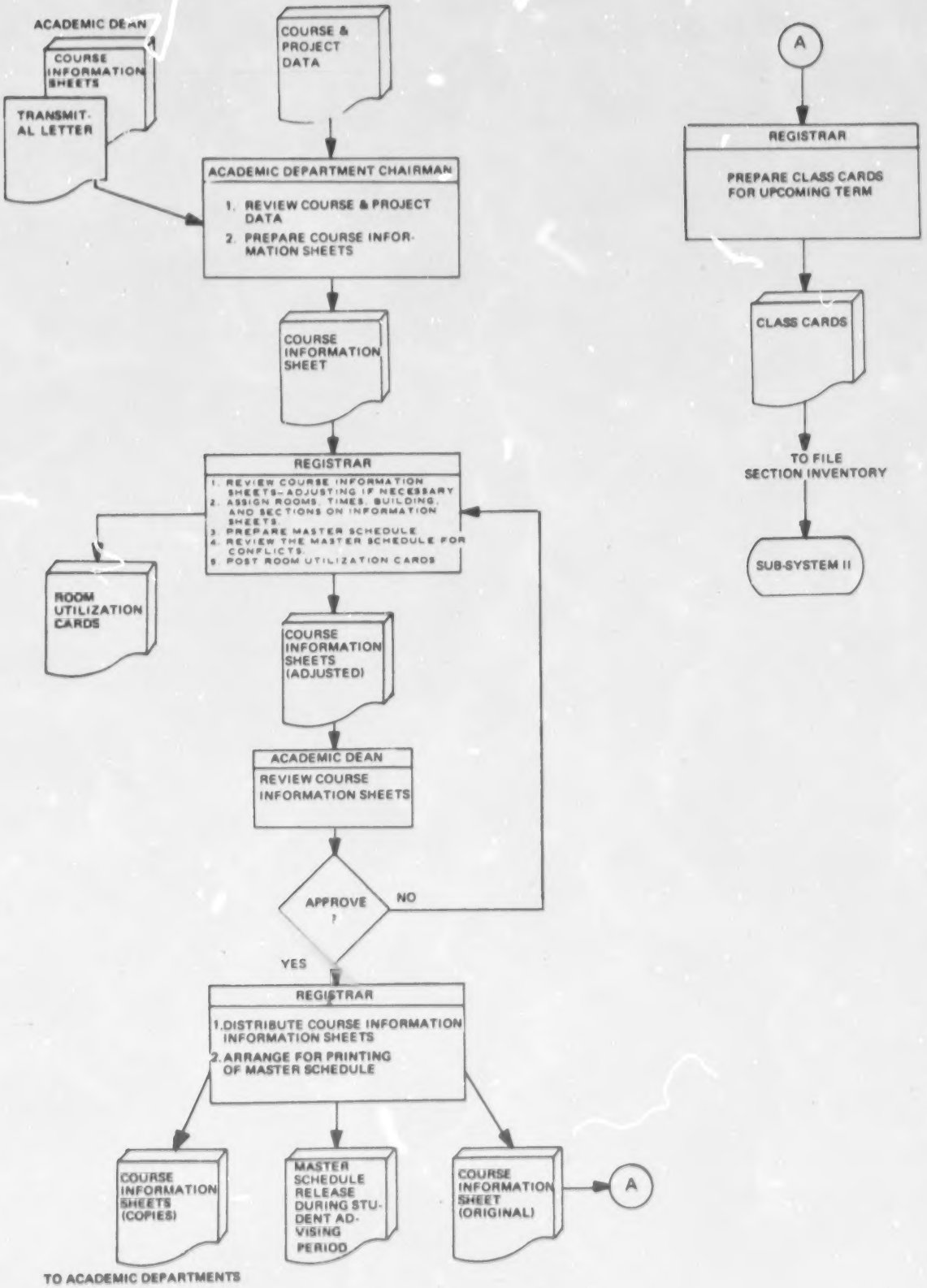
_____

(College Name)

Sub-System I - Preparation of the Master Schedule (Continued)

Action	Performed by
Serially number the cards for each section to indicate seats available. For example, if a class limit of 50 has been specified for English 101 - Section I, prepare sixty class cards with the section identification information. Number the first 50 cards from 1 to 50 and do not number the remaining ten cards.	Registrar
File all class cards by department course number and section in the Section Inventory File pending registration.	Registrar

SUB-SYSTEM 1 Preparation of Master Schedule



_____ COLLEGE

PAGE _____ OF _____

COURSE INFORMATION SHEET

DEPARTMENT _____ TERM _____ YEAR _____ DATE OF PREPARATION _____

COURSE NUMBER	DESCRIPTIVE TITLE OF COURSE	CREDIT HOURS	SECTION NUMBER	TYPE	CLASS LIMIT	EXPECTED ENROLLMENT	TIME AND DAYS REQUESTED	SPECIAL FACILITIES NEEDED	TIME & DAYS ASSIGNED	BUILDING & ROOM ASSIGNED	INSTRUCTOR NAME

177

THREE PART FORM
- REGISTRAR
- ACADEMIC DEAN
- DEPARTMENT

INSTRUCTIONS TO DEPARTMENT:

1. LIST ALL SECTIONS OF ALL COURSES TO BE OFFERED FOR TERM SHOWN (LEAVE SHADED COLUMNS BLANK)
2. REMEMBER THAT DESCRIPTIVE TITLE OF COURSE CANNOT EXCEED 25 CHARACTERS INCLUDING SPACES BETWEEN WORDS
3. BE SURE TO INDICATE ANY SPECIAL FACILITIES NEEDED FOR A CLASS

TYPE: C = LECTURE
L = LABORATORY
R = RECITATION/DISCUSSION
S = SEMINAR
T = THESIS / INDEPENDENT STUDY

_____
SIGNATURE OF DEPARTMENT CHAIRMAN

FORM R 101

To Department Chairman:

Enclosed you will find several blank course information sheets which are to be used to report the course offerings of your department for the _____ 19__ term. Instructions regarding completion of the form are provided on the face of the forms themselves.

In completing these forms, there are several additional points I would like you to keep in mind. First, all courses to be offered must, as you know, have been approved by the Committee on Courses and Curricula. If you are planning to add courses which have not yet been approved, the Committee will meet on _____ to review courses offered for approval.

Second, in requesting specific time sequences, please be mindful of the college policies regarding proportions of classes to be scheduled in the four general sections of the class week, namely M-W-F AM meetings, M-W-F PM meetings, T-T-S AM meetings, and T-T PM meetings. To the extent that you are able to pattern your requests to institutional policies, you will reduce the number of adjustments that may have to be made centrally to develop a coordinated and effective master schedule of classes.

Third, please note in the column provided all special classroom facilities required for the courses offered by your department.

Fourth, please notify the Registrar of any modifications you anticipate either in curricular patterns of students in your major fields or those enrolling in service courses offered by your department. This information will be extremely helpful to the Registrar in preparing a master schedule which keeps time conflicts in course selection to a minimum.

Finally, I must request that your completed course information sheets be forwarded to the Registrar no later than _____ so that we have adequate time to prepare and distribute the master schedule.

Sincerely yours,

Academic Dean

CLASS CELL MATRIX _____ DAY _____ HOUR

FORM SIZE 5" x 8"

* (Room ID) (Cap.)	(Room ID) (Cap.)	(Room ID) (Cap.)	(Room ID) (Cap.)	(Room ID) (Cap.)	(Room ID) (Cap.)	(Room ID) (Cap.)	(Room ID) (Cap.)
101 Web. 36							
Math. 104							
Jones							

Capacity of Room (36 Pupils)

Room ID (101 Webster Hall)

Course Title

Instructor

Example of Completed Box

* Note – Room ID Codes can be pre-printed on Form, prior to completing Matrix

FORM R-103

_____ COLLEGE

FORM SIZE – 5" x 8"

ROOM UTILIZATION CARD

Period	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Tot. Stu. Sta. Occ.

Special Characteristics:

TOTAL SECTIONS SCHEDULED IN ROOM → [ ]

TOTAL PERIODS ROOM IN USE → [ ]

TOTAL STUDENT STATIONS OCCUPIED → [ ]

Building	Floor	Room No.	Type of Room	Square Footage	Seating Capacity		
					Fixed Seats	Movable Seats	Total

180

IV-12

FROM R-104

FORM R-105

			CHECK ONE: Freshman ☐ Junior ☐ Special ☐ Sophomore ☐ Senior ☐	
Student Last Name First Name MI		Student Number	Class	Seat Number

CARD VALID ONLY WHEN REGISTRAR'S STAMP APPEARS • **CLASS ADMISSION AND GRADE CARD** • CARD VALID ONLY WHEN REGISTRAR'S STAMP APPEARS

Use Ball Point Pen – Print Firmly and Clearly

Name and Address where Grades are to be sent

Explanation of the Grading System appears on back

Dept. Course Section

Descriptive Title of Course

Credit Hrs. Term

Grade	Qual. Pts.	Instructor Signature

Instructor Comments:

Registrar's Validation Area

3 part form – a. Registrar - Grade Report
b. Instructor
c. Registrar - Section Enrollments

FORM SIZE – 3 1/4" x 7 3/8"

_____
(College Name)

Sub-System II - Student Academic Pre-Registration

Action	Performed by
Freshman and Transfer Students	
Forward Admissions Application Folder to Registrar upon notification that the prospective student has paid his deposit.	Director of Admissions
Prepare student folder and make initial entries (name, address, date and place of birth, basis of admission, sex, student number) to the Student Academic Record (Form R-201) from information provided in the Admission Application Folder.	Registrar
Place student folder in Active File for the term in which admitted & return Admissions Application Folder to Director of Admissions.	Registrar
Mail to enrolling student a package of registration materials including: . Course Request Form and Fee Bill (Form R-202) . A Master Schedule of Classes . A Catalogue/Bulletin . A Statement of Degree Requirements (Form R-203) . A letter explaining how to complete pre-registration by mail (Form R-204) . A return envelope for the student course request form.	Registrar

(College Name)

Sub-System II - Student Academic Pre-Registration, continued

Action	Performed by
(Note: For freshmen, the Statement of Degree Requirements will be a standard form which is prepared to show courses required of all freshmen and all other courses which they may elect. For Transfer Students, the Statement of Degree Requirements will be prepared by the Director of Admissions to show all transfer credit given.)	
Review materials; prepare and sign the Student Course Request Form and return to the Registrar by mail.	Student
Review Student Course Request Form for legibility and completeness. If illegible or incomplete return to student for correction.	Registrar
Review Student Course Request Form for legitimate course requests. If the student has requested courses in which he is not entitled to enroll, return the form to the student noting the course requests that are invalid, or delete the invalid course requests by drawing a line through them and initialing the column marked "Leave Blank."	Freshman Adviser
File Student Course Request Form (with Fee Bill still	Registrar

(College Name)

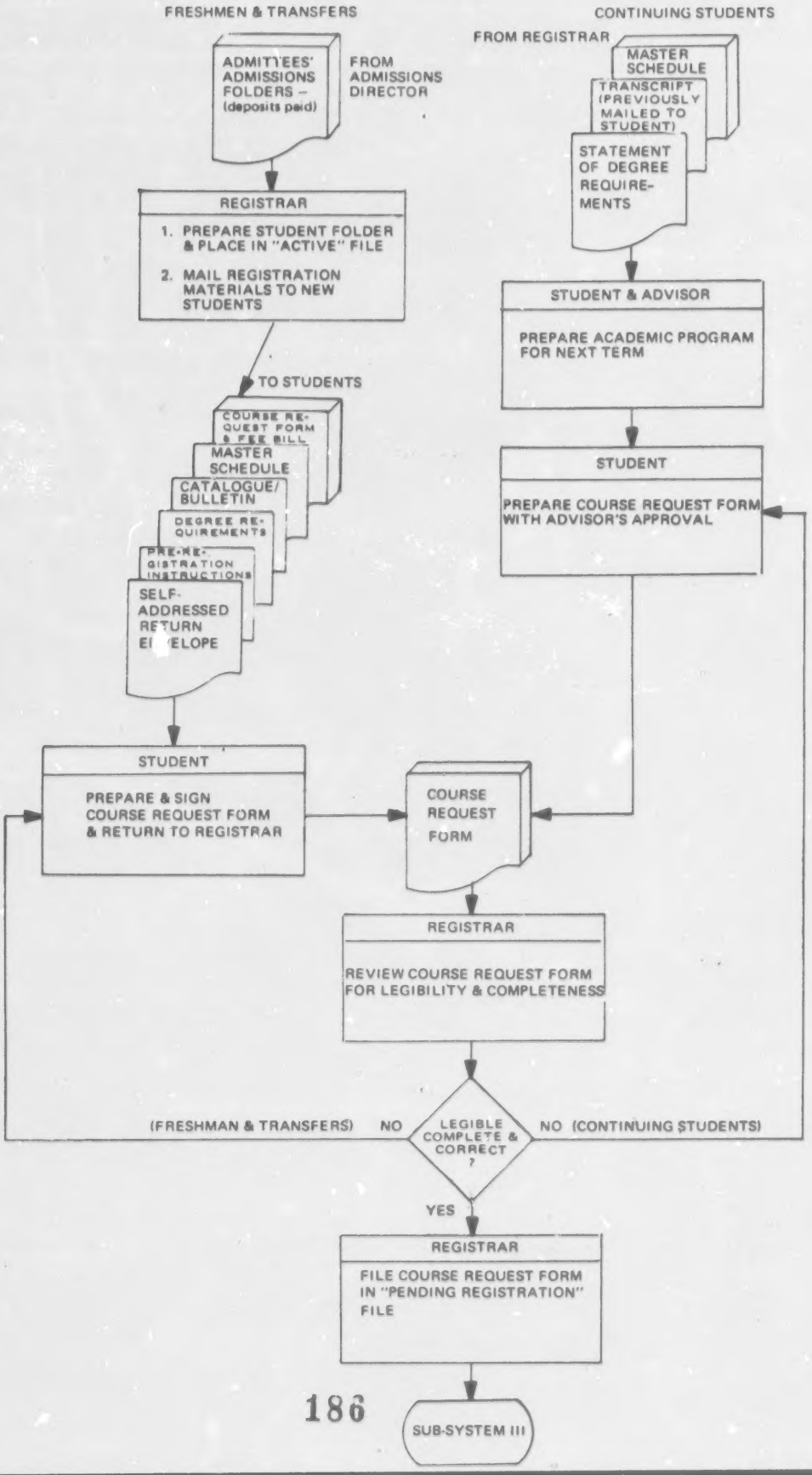
Sub-System II - Student Academic Pre-Registration, continued

Action	Performed by
attached) in Pending Registration File alphabetically by name.	
Continuing Students	
Provide printed master schedules for student and faculty use during advisory period which occurs during term preceding term for which registering. (During Spring advisory period, mail the student a transcript of his Student Academic Record at his local address.)	Registrar
Prepare academic program for next term relating that plan to the student's entire academic program, requirements for which are specified on the Statement of Degree Requirements.	Student & Adviser
Prepare and sign Course Request Form. Indicate auditor, pass-fail, or course repeat status in the column provided, using letter codes (which are described on the Master Schedule of Classes and the back of the Course Request Form).	Student
Approve and sign tentative program of study as specified on Course Request Form.	Adviser
Review Course Request Form for completeness and legibility when presented by student. If illegible or incomplete, return to student for correction.	Registrar

(College Name)

Sub-System II - Student Academic Pre-Registration, continued

Action	Performed by
File Course Request Form (with Fee Bill still attached) in Pending Registration File alphabetically by name.	Registrar


FRESHMEN & TRANSFERS
CONTINUING STUDENTS
FROM REGISTRAR
ADMITTEES' ADMISSIONS FOLDERS – (deposits paid)
FROM ADMISSIONS DIRECTOR
MASTER SCHEDULE
TRANSCRIPT (PREVIOUSLY MAILED TO STUDENT)
STATEMENT OF DEGREE REQUIRE-MENTS
REGISTRAR
1. PREPARE STUDENT FOLDER & PLACE IN "ACTIVE" FILE
2. MAIL REGISTRATION MATERIALS TO NEW STUDENTS
STUDENT & ADVISOR
PREPARE ACADEMIC PROGRAM FOR NEXT TERM
TO STUDENTS
COURSE REQUEST FORM & FEE BILL
MASTER SCHEDULE
CATALOGUE/ BULLETIN
DEGREE REQUIREMENTS
PRE-REGISTRATION INSTRUCTIONS
SELF-ADDRESSED RETURN ENVELOPE
STUDENT
PREPARE COURSE REQUEST FORM WITH ADVISOR'S APPROVAL
STUDENT
PREPARE & SIGN COURSE REQUEST FORM & RETURN TO REGISTRAR
COURSE REQUEST FORM
REGISTRAR
REVIEW COURSE REQUEST FORM FOR LEGIBILITY & COMPLETENESS
(FRESHMAN & TRANSFERS) NO
LEGIBLE COMPLETE & CORRECT ?
NO (CONTINUING STUDENTS)
YES
REGISTRAR
FILE COURSE REQUEST FORM IN "PENDING REGISTRATION" FILE
SUB-SYSTEM III

_____ COLLEGE

FORM R-201

Student Last Name	First Name	Middle Name	Sex Male ☐ Female ☐	Student Number
Street Address			Date of Birth	Place of Birth
City and State			Basis of Admission	
Major Course of Study				

_____ COLLEGE
ADDRESS

STUDENT ACADEMIC RECORD

ACT	CEEB	USOE
Number	Number	Number

Course Number	Descriptive Title of Course	Credit Hours	Grade	Qual. Pts.	Course Number	Descriptive Title of Course	Credit Hours	Grade	Qual. Pts.

Term	Term Hours	Term Q.P.A.	Cumulative Hours	Cumulative Q.P.A.	Term	Term Hours	Term Q.P.A.	Cumulative Hours	Cumulative Q.P.A.

Degrees Awarded:

Status at time of last Attendence

NOTES

VERIFICATION OF RECORD

When affixed with the seal of the College and signed by the Registrar, the above is an official copy of the record on file in this office as of the date shown.

_____ Signature of Registrar

_____ Date

187

Last Name	First Name	M.I.	Student Number	Major	Class	Term

Dept.	Course No.	Descriptive Title	Section (Leave Blank)	Time and Days	Cred. Hrs.	Status	Leave Blank

Mail Confirmation of Schedule to:

_____

_____

_____

TOTAL CREDIT HOURS

_____
Signature of Student

STUDENT COURSE REQUEST FORM
REGISTRAR COPY

_____
Date

_____
Signature of Advisor

Last Name	First Name	M.I.	Student Number	Term

FEE BILL
BURSAR COPY

STUDENT INSTRUCTIONS - 1. Record your Name and Student Number in the spaces provided above.
2. Write the Name and Address to whom the bill should be sent below.
3. Make NO OTHER entries on this Fee Bill.

		AMOUNT	TOTAL
CHARGES:	PREVIOUS BALANCE DUE	$	
	TUITION – FULL-TIME ☐ OR PART-TIME ☐ (_____ HRS. @ $_____ PER CRED. HOUR)		
	HOUSING FEE $_____ AND BOARDING FEE $_____		
	GENERAL FEES $_____ STUDENT ACTIVITY FEE $ _____		
	LAB FEES $_____ MUSIC FEES $_____ LATE REGISTRATION $_____		
	OTHER FEES –		
	TOTAL CHARGES		$
CREDITS	SCHOLARSHIPS –	$	
	LOANS – NDSL $_____ OTHER $ _____		
	EDUCATIONAL OPPORTUNITY GRANT $_____ OTHER GRANT $_____		
	TOTAL CREDITS		$
	BALANCE DUE		
	LESS ANTICIPATED EARNINGS FROM CWS		
	PAYMENT REQUIRED AT REGISTRATION		$

Mail Fee Bill To:

_____

_____

_____

TWO PART FORM – INSTRUCTIONS ON BACK OF FORM

FORM SIZE – 8" x 10"

STATEMENT OF DEGREE REQUIREMENTS

MAJOR FIELD _____

FOR: _____ DATE: _____

DEGREE REQUIREMENTS	Credit Hours	REQUIREMENT SATISFIED BY:	In Progress	Credits Achieved			Grade
				Hours	Term	Year	
FRESHMAN YEAR: [Below each year heading, list required courses & electives (hours).]		[List courses completed here; for transfer students include all courses completed at previous college for which credit is awarded.]					
SOPHOMORE YEAR:							
JUNIOR YEAR:							
SENIOR YEAR:							
TOTAL CREDIT HOURS REQUIRED		TOTAL CREDIT HOURS ACHIEVED					
TRANSFER CREDIT APPLIED FROM _____ COLLEGE OR UNIVERSITY SHOWN ABOVE							

Dear Mr. _____: (College)

On behalf of the Department (College) let me welcome you into our Degree Program. This form outlines the Program of Study you must follow to satisfactorily complete the major requirements of this Department. It is therefore an important and useful dowment which you should retain and keep current throughout your student career here at _____. Use this form as a worksheet to keep track of your academic progress. Have it with you when you meet with your advisor each term to plan your future course selections.

Sincerely yours,

_____
DEPARTMENT CHAIRMAN

Form Letter

Dear Student:

To facilitate your registration for classes for the _____ term, we are sending you some materials to enable you to select the courses you wish prior to the date of registration. This early registration offers several advantages. First, you will have a better chance of obtaining the courses you want at times and days of your choosing. Second, you will probably reduce the time required for your registrat. uring this initial term on campus, permitting you more time to become familiar with your new environment, to pick up class supplies, and to make new friends. Therefore, we encourage you to take advantage of this opportunity to accomplish part of your registration in advance.

The enclosed forms include (1) a Statement of Degree Requirements, which indicates the courses you are required to take as a freshman and the electives that are available to you or the transfer credit awarded to you, (2) A Master Schedule of Classes which lists all courses and their times of meeting, (3) A Catalogue/Bulletin which may also prove helpful for reference, (4) A Student Course Request/Fee Bill Form on which you may indicate your course selections, and (5) A return envelope which you may use to mail us your Course Request Form.

Review the instructions on the back of the Course Request Form carefully before completing it. Be sure to write nothing more than your name on the Fee Bill section of the form. We will complete the rest of that form. Since you have not yet received a student number, please make no marks in the spaces provided for it. We will assign one to you subsequently.

After completing the Course Request Form, and the appropriate section of the Fee Bill, insert both in the envelope provided, (do not detach one from the other), and mail it to us. No other materials need be returned. It is important, however, that you bring the Statement of Degree Requirements with you when you enroll for classes, since you will be using it in subsequent terms and since your advisor will wish to see it if you need to counsel with him.

If you should have questions regarding the courses open to you, the choices you wish to make, or how to complete the forms, we suggest you write, telephone, or visit Mr. . , who is in charge of our (freshman/transfer) counseling program.

Welcome to our college and I look forward to the opportunity to meet you personally during your career here at College.

Sincerely yours,

Registrar

_____
(College Name)

Sub-System III - Pre-Registration, Student Sectioning

Action	Performed by
Receive Course Request Forms until cut-off date. Purge file of Forms submitted by students who have withdrawn or been dismissed since preparation of Form.	Registrar
Prepare a tally of tentative registrations by course and section. Note carefully those courses which have inflexible class limits that may be exceeded or multiple sections. The course tally sheet need indicate only course number, time and days of meetings, and tally of students requesting each section listed.	
Determine section adjustment necessary to accommodate student demand, giving weight to historical experience regarding tentative demand and subsequent actual demand as evidenced by previous registrations. Sections may be added, cancelled, or class limits adjusted.	Registrar & Department Chairman
If adjustments are necessary:	
Prepare class cards and post adjustments to Course Information Sheet and a roster of master schedule adjustments (sections added or cancelled) to be issued to students on Registration day.	Registrar

_____
(College Name)

Sub-System III - Pre-Registration, Student Sectioning (Continued)

Action	Performed by
Prepare tub files for pulling of class cards. Place class cards in file by department, course and, for multiple section courses, time and day of meeting. Insert color coded limit cards (for those courses with critical class limits) behind the serially numbered class cards and in front of the unnumbered cards for the courses concerned.	Registrar
Arrange Course Request Forms in priority of registration sequence. For example, priorities might be assigned to handicapped students, students working off-campus, etc. Request forms might also be arranged by class-seniors first, juniors second, and so on - and then by major field of study within class - fields with critical schedule requirements being processed first.	Registrar
Process each Course Request Form, pulling class cards corresponding to the course selections indicated on the form. In pulling class cards, the card with the lowest seat number should be the one pulled. If one or more course requests cannot be filled in the time and days	Registrar

_____
(College Name)

Sub-System III - Pre-Registration, Student Sectioning, Continued

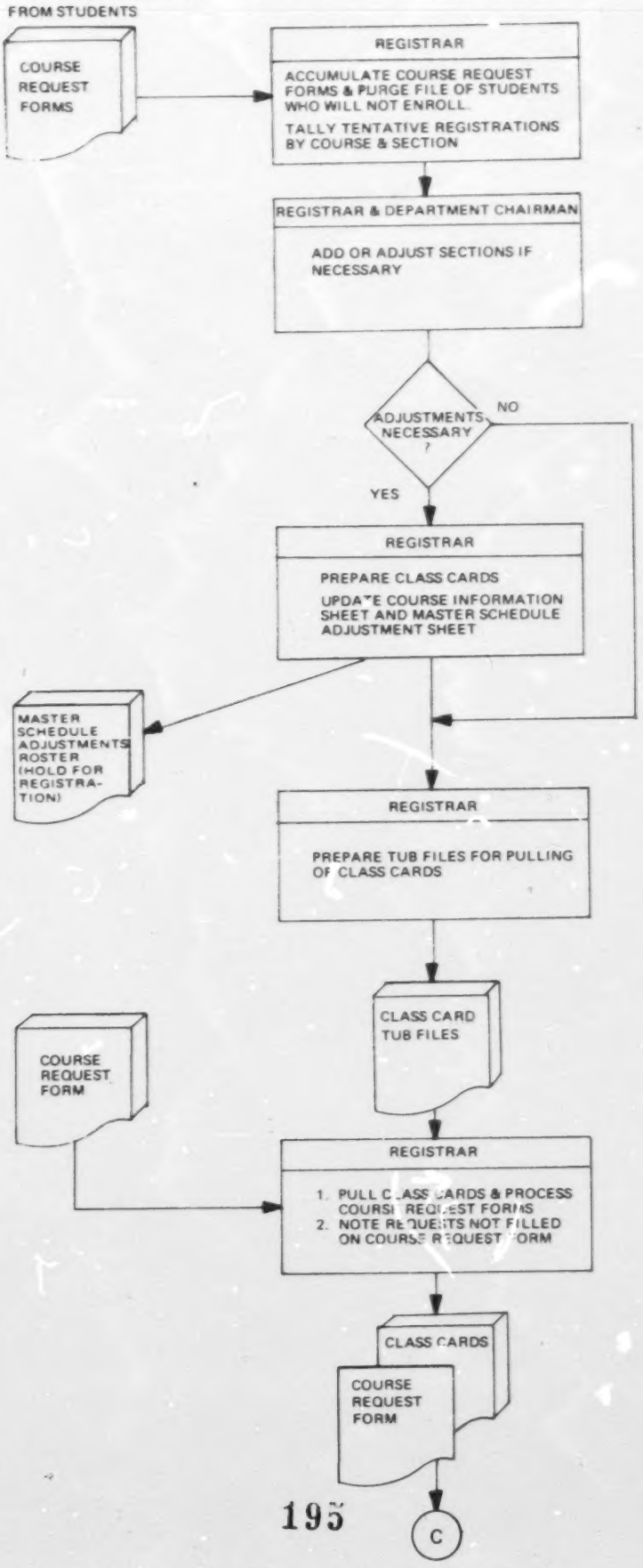
Action	Performed by
indicated by the student, so note on the form but pull class cards for those courses requests which can be accommodated.	
Verify that a proper class card has been pulled for each entry on the student Course Request Form or that a course request not filled has been noted on the form.	Registrar
Record section numbers in column provided on student Course Request Form; check full or part-time status on fee bill, indicating hours in appropriate space if student has requested a part-time program.	Registrar
Check for special course fees (Music, etc.) which are identified by color coded class cards. Post total of such fees to Fee Bill section of form .	Registrar
Separate Fee Bill from student Course Request Form. Foward Fee Bill to Business Office. Separate copies of Student Course Request Form. Insert original copy of	Registrar

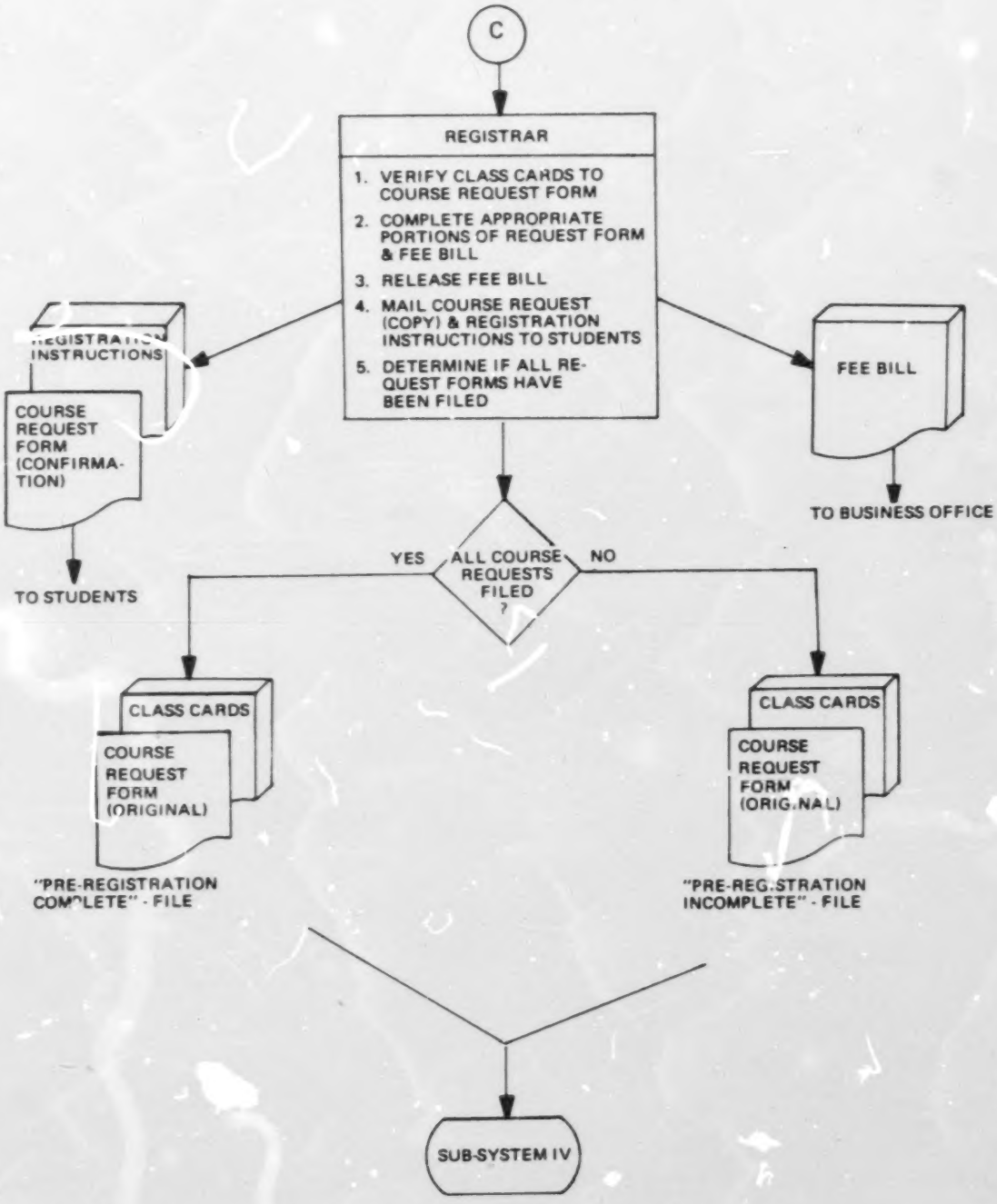
_____
(College Name)

Sub-System III - Pre-Registration, Student Sectioning, Continued

Action	Performed by
Student Course Request Form and accompanying class cards in a window envelope and place in (a) Pre-Registration Complete file if all course requests of the students were filled or in (b) Pre-Registration Incomplete file if all requests were not filled. In both cases, file alphabetically by name. Hold for Registration Day.	
Insert copy of the Student Request Form in a window envelope and mail to student. If the student was successfully sectioned into all the courses he had requested, insert Form R-301. If all the student's course requests were not filled, insert Form R-302.	Registrar

SUB-SYSTEM III. Pre-Registration, Student Scheduling


FROM STUDENTS
COURSE REQUEST FORMS
REGISTRAR
ACCUMULATE COURSE REQUEST FORMS & PURGE FILE OF STUDENTS WHO WILL NOT ENROLL.
TALLY TENTATIVE REGISTRATIONS BY COURSE & SECTION
REGISTRAR & DEPARTMENT CHAIRMAN
ADD OR ADJUST SECTIONS IF NECESSARY
ADJUSTMENTS NECESSARY ?
NO
YES
REGISTRAR
PREPARE CLASS CARDS
UPDATE COURSE INFORMATION SHEET AND MASTER SCHEDULE ADJUSTMENT SHEET
MASTER SCHEDULE ADJUSTMENTS ROSTER (HOLD FOR REGISTRATION)
REGISTRAR
PREPARE TUB FILES FOR PULLING OF CLASS CARDS
CLASS CARD TUB FILES
COURSE REQUEST FORM
REGISTRAR
1. PULL CLASS CARDS & PROCESS COURSE REQUEST FORMS
2. NOTE REQUESTS NOT FILLED ON COURSE REQUEST FORM
CLASS CARDS
COURSE REQUEST FORM
C


C
REGISTRAR
1. VERIFY CLASS CARDS TO COURSE REQUEST FORM
2. COMPLETE APPROPRIATE PORTIONS OF REQUEST FORM & FEE BILL
3. RELEASE FEE BILL
4. MAIL COURSE REQUEST (COPY) & REGISTRATION INSTRUCTIONS TO STUDENTS
5. DETERMINE IF ALL REQUEST FORMS HAVE BEEN FILED
INSTRUCTIONS
COURSE REQUEST FORM (CONFIRMATION)
TO STUDENTS
FEE BILL
TO BUSINESS OFFICE
YES
ALL COURSE REQUESTS FILED ?
NO
CLASS CARDS
COURSE REQUEST FORM (ORIGINAL)
"PRE-REGISTRATION COMPLETE" - FILE
CLASS CARDS
COURSE REQUEST FORM (ORIGINAL)
"PRE-REGISTRATION INCOMPLETE" - FILE
SUB-SYSTEM IV

FORM LETTER

Dear Student:

As enclosed Student Course Request Form indicates, you have been enrolled in all the courses you have requested. This will simplify the registration process for you on Registration day.

When you arrive on campus to pick up your class cards be sure to complete your financial arrangements with the Business Office before requesting your class cards from us. Our staff will be authorized to issue validated class cards only to those students who present a fee receipt obtained from the Bursar. When you have your fee receipt, take it with you to our station for "Pre-Registered Complete" students, where your class cards will have been filed. There you will complete a Student Information Form and record your name and student number on each class card. The class cards will then become your "admission tickets" to the courses you have selected and should be turned in to your instructors at the first meeting of each of your classes.

Sincerely yours,

Registrar

Form R-302

FORM LETTER

Dear Student:

As your enclosed Student Course Request Form indicates, we were unable to enroll you in one or more of the classes you had selected. However, classes you had requested and in which space was available are being held for you.

When you arrive on campus to complete your registration, you should complete another Course Request Form, listing only your alternate selections to those you did not achieve. The second form will be used to select class cards for the alternate courses you have chosen and will subsequently be merged with your original Course Request Form. On Registration Day, please bring your Course Request to the registration station designated "Pre-Registered Incomplete."

Sincerely yours,

Registrar

_____
(College Name)

Sub-System IV - Registration

Action	Performed by
Students will arrive at the registration area with varying degrees of Pre-Registration processing completed.	
For students who have obtained a complete schedule and have paid their fees in advance: see procedures described after the heading "Students with Completed Schedules and Fees Paid."	
For students who have a completed schedule but have not paid fees: see procedures described after heading "Students with Completed Schedules."	
Students with Schedules Requiring Adviser Approval	
If student has not been advised prior to registration and has not completed a Course Request Form:	
(a) Meet with adviser to plan academic program.	Student and Adviser
(b) Prepare and sign Student Course Request Form.	
(c) Approve student's academic program and course selections for current term.	
If a student's requests were not filled in initial selection of courses:	
(a) Prepare alternative course selections to replace those requests not filled.	Student and Adviser

_____
(College Name)

Sub-System IV - Registration (Continued)

Action	Performed by
(b) Complete and sign Student Course Request Form.	Student
(c) Review and sign Student Course Request Form, To signify approval of schedule.	Advisor
Present Student Course Request Form to Registrar.	Student
Review Student Request Form for completeness and legibility. If illegible or incomplete, return to student for correction.	Registrar
Check Pre-Registration Complete and Pre-Registration Incomplete File to insure that student is not presenting a duplicate Student Course Request Form. The student may be requesting alternatives to an original set of requests which were not completely filled. In such cases, the next step may be avoided.	Registrar
Check Permanent Record File to verify that student is authorized to register for classes. If student is not, inform student of the reason and the office to which he should appeal if he wishes.	Registrar
If student has in his possession a Validated Request for Registration Clearance Action (Form R-401), remove one copy of the clearance form and file in the student's permanent record folder. Then continue his registration.	

_____
(College Name)

Sub-System IV - Registration (Continued)

Action	Performed by
Process Student Course Request Form, pulling class cards corresponding to the course selections indicated on the form. Note any course requests not filled. If the courses represent alternatives, staple the two Student Course Request Forms together.	Registrar
Verify that the proper class card has been pulled for each entry on the Student Course Request Form.	Registrar
Record section numbers; check full-time or part-time status, and hours as indicated in Sub-System II.	Registrar
Separate Student Course Request Form and Fee Bill; distribute in manner described in Sub-System II.	Registrar
Post Tuition and Special Instructional Fees from Fee Bill received from Registrar to a previously prepared Fee Bill containing other student charges and credits.	Bursar
Place consolidated and now complete Fee Bill in Bursar Fee Bill file. (Student continues his registration in succeeding steps)	Bursar

_____
(College Name)

Sub-System IV - Registration (Continued)

Action	Performed by
Students with Completed Schedules	
If student is receiving financial aid: (a) Execute financial aid award documents (loyalty oath, loan agreement form, EOG and College Work Study standard forms). (b) Obtain financial aid clearance form (Form R-402) signed by Financial Aid Officer.	Student and Financial Aid Officer
Pull fee bill for student when he presents himself to pay his bill.	Bursar
If a Request for Registration Clearance Action card is attached to the bill and the student does not have a validated copy of the card, inform the student of the office or offices which have requested that the student clear with them before being allowed to register and instruct the student to report to the appropriate office(s).	Bursar
If the student has a validated copy of the Request for Registration Clearance Action card indicating clearance by the office concerned, detach the original copy from the Fee Bill and attach the validated copy presented by the student. Place the Request for Registration Clearance Action Card in history file.	Bursar

_____
(College Name)

Sub-System IV - Registration (Continued)

Action	Performed by
Check Fee Bill for financial aid entries. If the Fee Bill indicates the student is receiving financial aid, verify that he has a valid financial aid clearance form. Otherwise, instruct him to clear with the financial aid desk before settling his account.	Bursar
Collect fees due and prepare a fee receipt. (A copy of the fee bill would suffice if properly validated. In any case, the fee receipt should display the student's name.) (Student continues registration with succeeding steps)	Bursar
<u>Students With Completed Schedules and Fees Paid</u>	
Prepare a Student Information Card (Form R-403) and a Compliance Report Data Card. (Fall term only) (Form R-404)	Student
Check student fee receipt; accept Student Information card if it is legible and complete; otherwise, return form to student to make corrections.	Registrar
Accept Compliance Report Data Card and hold for Compliance Report preparation.	Registrar
Pull Student Course Request Form and class cards from Pre-Registration Complete file.	Registrar

_____
(College Name)

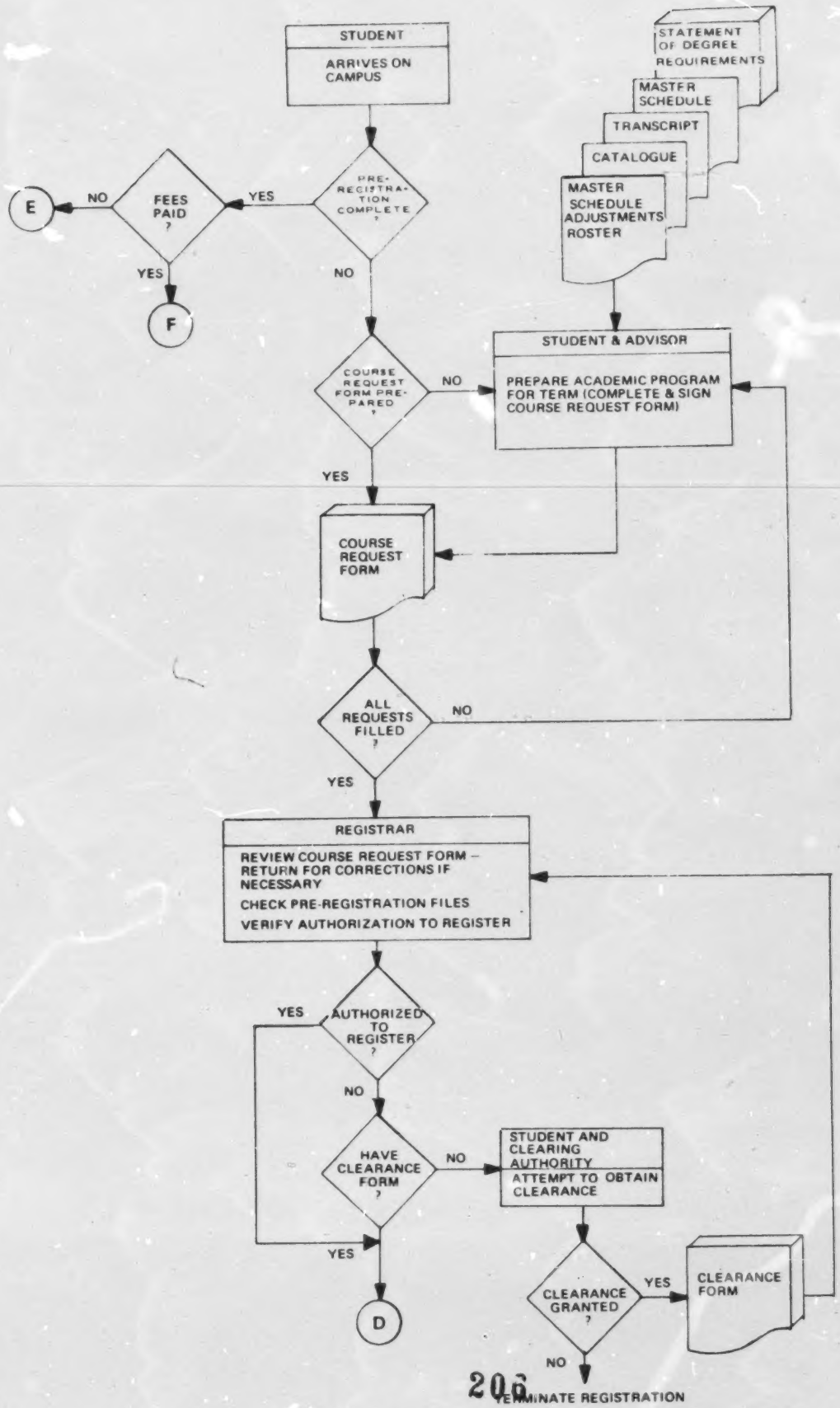
Sub-System IV - Registration (Continued)

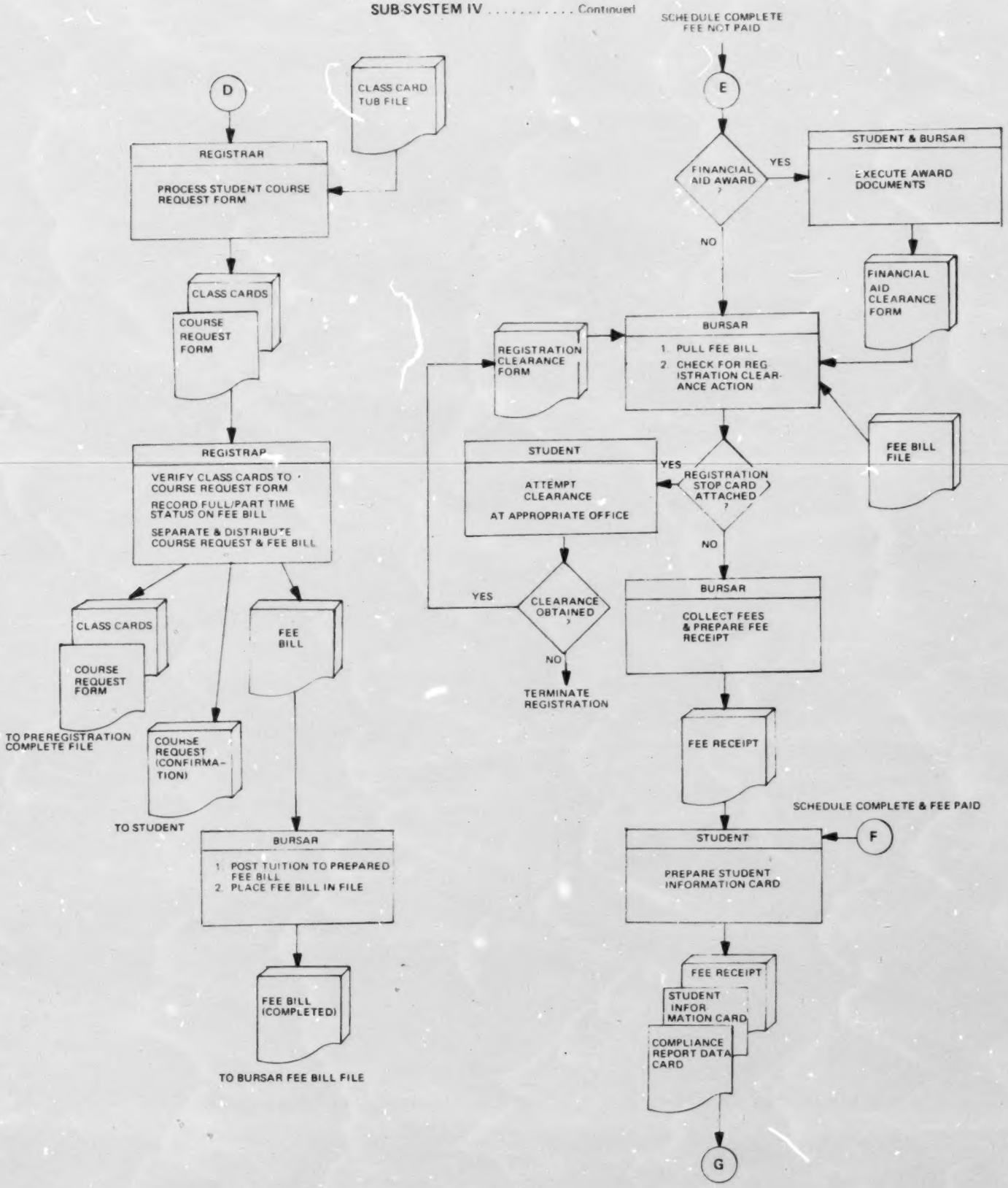
Action	Performed by
Record name and number on each class card. (An embossed student I.D. card may be used for this purpose.)	Student
Validate class cards. Remove registrar copy of class card from each three part class card. File in Section Enrollments file. Give remaining two copies of each class card to student to be turned in to instructor.	Registrar
Prepare Selective Service Notification Request (Form R-405) (optional for male students in Fall term) and turn in to Registrar at registration.	Student
Prepare VA Enrollment Certification Request, if appropriate, (Form R-406) and turn in to Registrar at registration.	Student
Distribute copies of the Student Information card to the Dean of Students and the Public Relations office.	Registrar
File Student Course Request Forms (hereafter called Registration Cards) alphabetically by student name.	Registrar
Record the name and address to whom grades are to be mailed on all class cards in the space provided. (May be done after leaving registration area.)	Student

_____
(College Name)

Sub-System IV - Registration (Continued)

Action	Performed by
Prepare a student directory from information supplied on Information card.	Registrar
Turn in class cards to instructors at first day of class meeting.	Student


STUDENT
ARRIVES ON CAMPUS
STATEMENT OF DEGREE REQUIREMENTS
MASTER SCHEDULE
TRANSCRIPT
CATALOGUE
MASTER SCHEDULE ADJUSTMENTS
ROSTER
PRE-REGISTRATION COMPLETE ?
YES
NO
FEES PAID ?
NO
YES
E
F
COURSE REQUEST FORM PREPARED ?
NO
YES
STUDENT & ADVISOR
PREPARE ACADEMIC PROGRAM FOR TERM (COMPLETE & SIGN COURSE REQUEST FORM)
COURSE REQUEST FORM
ALL REQUESTS FILLED ?
NO
YES
REGISTRAR
REVIEW COURSE REQUEST FORM – RETURN FOR CORRECTIONS IF NECESSARY
CHECK PRE-REGISTRATION FILES
VERIFY AUTHORIZATION TO REGISTER
AUTHORIZED TO REGISTER ?
YES
NO
HAVE CLEARANCE FORM ?
NO
YES
STUDENT AND CLEARING AUTHORITY
ATTEMPT TO OBTAIN CLEARANCE
CLEARANCE GRANTED ?
YES
NO
CLEARANCE FORM
D
TERMINATE REGISTRATION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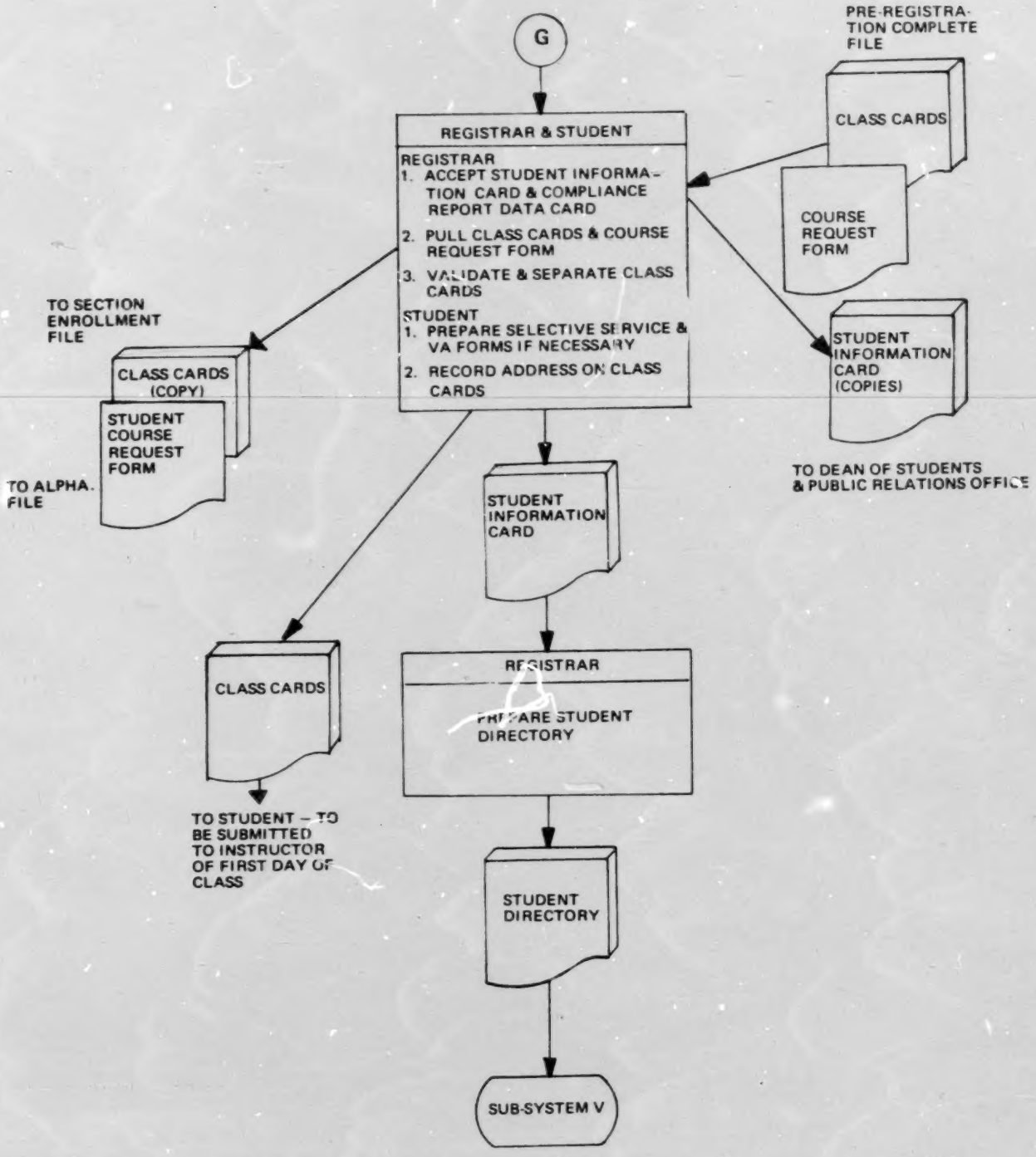
CLASS CARD TUB FILE
REGISTRAR
PROCESS STUDENT COURSE REQUEST FORM
CLASS CARDS
COURSE REQUEST FORM
REGISTRAP
VERIFY CLASS CARDS TO COURSE REQUEST FORM
RECORD FULL/PART TIME STATUS ON FEE BILL
SEPARATE & DISTRIBUTE COURSE REQUEST & FEE BILL
CLASS CARDS
COURSE REQUEST FORM
TO PREREGISTRATION COMPLETE FILE
COURSE REQUEST (CONFIRMATION)
TO STUDENT
FEE BILL
BURSAR
1. POST TUITION TO PREPARED FEE BILL
2. PLACE FEE BILL IN FILE
FEE BILL (COMPLETED)
TO BURSAR FEE BILL FILE
SCHEDULE COMPLETE FEE NOT PAID
E
FINANCIAL AID AWARD ?
YES
STUDENT & BURSAR
EXECUTE AWARD DOCUMENTS
FINANCIAL AID CLEARANCE FORM
NO
BURSAR
1. PULL FEE BILL
2. CHECK FOR REGISTRATION CLEARANCE ACTION
REGISTRATION CLEARANCE FORM
FEE BILL FILE
STUDENT
ATTEMPT CLEARANCE AT APPROPRIATE OFFICE
YES
REGISTRATION STOP CARD ATTACHED ?
NO
YES
CLEARANCE OBTAINED ?
NO
TERMINATE REGISTRATION
BURSAR
COLLECT FEES & PREPARE FEE RECEIPT
FEE RECEIPT
SCHEDULE COMPLETE & FEE PAID
F
STUDENT
PREPARE STUDENT INFORMATION CARD
FEE RECEIPT
STUDENT INFORMATION CARD
COMPLIANCE REPORT DATA CARD
G


G
PRE-REGISTRATION COMPLETE FILE
CLASS CARDS
COURSE REQUEST FORM
REGISTRAR & STUDENT
REGISTRAR
1. ACCEPT STUDENT INFORMATION CARD & COMPLIANCE REPORT DATA CARD
2. PULL CLASS CARDS & COURSE REQUEST FORM
3. VALIDATE & SEPARATE CLASS CARDS
STUDENT
1. PREPARE SELECTIVE SERVICE & VA FORMS IF NECESSARY
2. RECORD ADDRESS ON CLASS CARDS
TO SECTION ENROLLMENT FILE
CLASS CARDS (COPY)
STUDENT COURSE REQUEST FORM
TO ALPHA. FILE
STUDENT INFORMATION CARD (COPIES)
TO DEAN OF STUDENTS & PUBLIC RELATIONS OFFICE
STUDENT INFORMATION CARD
CLASS CARDS
REGISTRAR
PREPARE STUDENT DIRECTORY
TO STUDENT – TO BE SUBMITTED TO INSTRUCTOR OF FIRST DAY OF CLASS
STUDENT DIRECTORY
SUB-SYSTEM V

_____ College

FORM R-401

STUDENT LAST NAME FIRST NAME MI	STUDENT NUMBER	REQUEST FOR REGISTRATION CLEARANCE ACTION

DATE: _____

TO: REGISTRAR

FROM: _____

THE ABOVE NAMED STUDENT SHOULD NOT BE PERMITTED TO REGISTER WITHOUT FIRST OBTAINING CLEARANCE FROM THIS OFFICE.

ACCEPT AN APPROPRIATE SIGNED COPY OF THIS FORM AS YOUR AUTHORIZATION TO REGISTER THE STUDENT.

_____

SIGNATURE OF REQUESTOR OFFICE

COMPLETE THIS SECTION TO AUTHORIZE REGISTRATION

DATE _____

TO: REGISTRAR

THIS OFFICE WITHDRAWS ITS REQUEST THAT THE ABOVE NAMED STUDENT BE PROHIBITED FROM REGISTRATION FOR THIS TERM.

SIGNATURE OF APPROVING AUTHORITY OFFICE

Form Size - 5" x 8"

Student Last Name First Name Mi _____ Student Number

FINANCIAL AID CLEARANCE FORM

The above named student has appeared before me on this date and executed the documents necessary to his/her legitimate receipt of the financial aid awards granted by or through this institution.

_____ Date

_____ Signature-Financial Officer

Form Size - 8 1/2" x 5 1/2"

_____ COLLEGE

FORM R-403

Last Name	First Name	M.I.	Student Number	Major	Class	Male ☐ Female ☐ Sex (check appropriate box)

STUDENT PERMANENT OR HOME ADDRESS:

Street Address	Town or City	County	County Code	State	State Code	Telephone No.

STUDENT LOCAL ADDRESS:

Dormitory	Dorm Code	OR	Street Address	Town or City	Telephone No.	Resident Student ☐ Commuter Student ☐ Status (check one)

PARENT/GUARDIAN NAME AND ADDRESS:

Parent/Guardian Name	Street Address	Town or City	State	Telephone No.

PERSON TO NOTIFY IN EVENT OF EMERGENCY:

Name – Show Relationship if Related	Street Address	Town or City	State	Telephone No.

STUDENT STATUS:

CHECK ONE BOX — First Time Freshman ☐ Continuing Student ☐ Returning Student ☐ Transfer Student ☐ Special Student ☐

OTHER DATA:

Fraternity or Sorority	Home Town Newspaper	Religion (Optional)	CHECK BOX IF MARRIED ☐	Maiden Name

MO. / DAY / YR.
DATE OF BIRTH

INSTRUCTIONS:

1. Review codes and definitions appearing on the back of this form BEFORE completing it.
2. Use a ball point pen; press firmly; write on a hard surface.
3. Write legibly. To be useful, the form must be readable and complete.
4. Sign the Form.

_____ COLLEGE

STUDENT INFORMATION CARD

_____ Student Signature

_____ Date

FORM SIZE – 5" x 8"

Colleges

COMPLIANCE REPORT DATA FORM

In accordance with Title VI of the Civil Rights Act of 1964, the College must make a report to the Federal government regarding the minority group representation among members of its student population.

We ask that you assist us in this requirement by checking the appropriate boxes in the categories provided below. Your response will remain anonymous.

Thank you,

_____
Registrar

Student Response Section

1. My student status is: (Check one)

Freshman _____

Sophomore _____

Junior _____

Senior _____

First year Graduate or Professional Student _____

Second year Graduate or Professional Student _____

2. I consider myself a member of one of the following minority groups (check one if appropriate):

American Indian _____

Negro _____

Oriental _____

Spanish Surnamed American _____

3. I do not consider myself to be a member of one of the above named minority groups _____.

_____ COLLEGE

SELECTIVE SERVICE NOTIFICATION REQUEST

NAME _____
Last Name First Name Middle Name

SELECTIVE SERVICE NUMBER _____ - _____ - _____

LOCAL ADDRESS _____ _____ _____
Street or Dorm City State

PLEASE NOTIFY _____ - _____
Local Board

_____
Street Address

_____
City and State

OF MY STUDENT STATUS. I UNDERSTAND THAT ANY CHANGE IN MY STUDENT STATUS WILL BE AUTOMATICALLY FORWARDED TO THE LOCAL BOARD NAMED.

_____ _____
SIGNATURE OF STUDENT DATE

_____ College

VA ENROLLMENT CERTIFICATION REQUEST

Name _____ VA File No.____

Current
Address _____
_____
_____

Degree
Program _____

Credit Hours Carried This Term _____

To Student:

This Form will be used to prepare your enrollment certification to the Veterans Administration.

It must be completed at least once each year (normally at the start of the Fall Term) if you are to receive the benefits to which you are entitled.

Form Size - 5" x 8"

_____
(College Name)

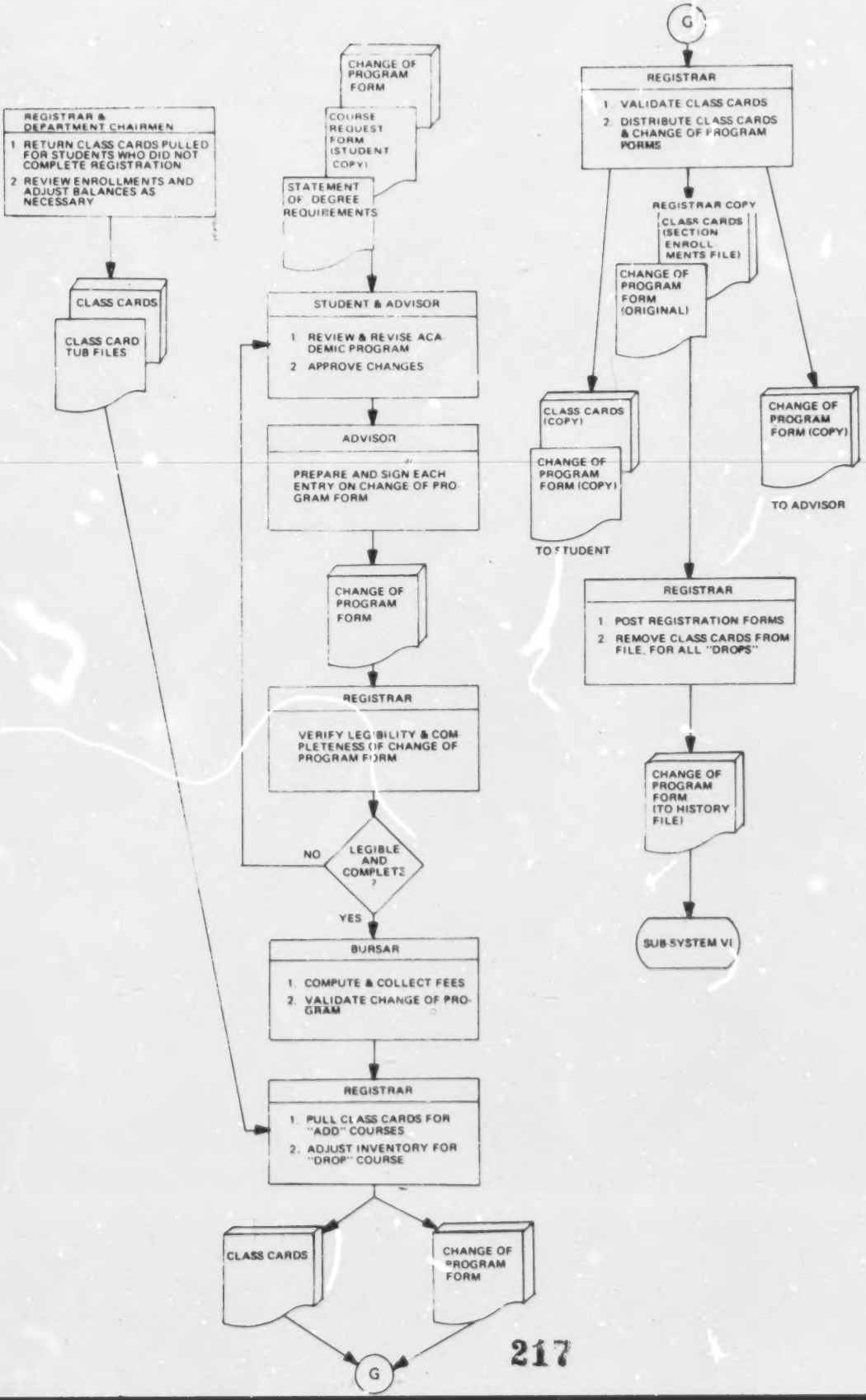
Sub-System V - Change of Program

Action	Performed by
Return to the Section Inventory File class cards pulled for students who pre-registered but did not complete registration on the day(s) set aside for registration.	Registrar
Review enrollments by section and adjust Section Inventory File as necessary, adding cards if the section is expanded, cancelling sections and shifting students to other sections if enrollments are not sufficient to warrant the section.	Registrar and Department Chairman
Make alternate class selections, referring to student copy of Student Course Request Form and Statement of Degree Requirements.	Student and Adviser
Prepare and sign each course entry on Change of Program Form (Form R-501).	Adviser
Verify legibility and completeness of Change of Program Form. If not legible and complete, return to student for correction.	Registrar
Compute and collect any fees due; validate Change of Program form.	Bursar
Pull class cards from the Section Inventory File for each "add" course indicated on the Change of Program	Registrar

_____
(College Name)

Sub-System V - Change of Program, continued

Action	Performed by
Form. For each "drop", take a class card from the unnumbered group provided for each section, note the lowest seat number of the section still remaining in the file, subtract 1 from that number, record it in the seat number box on the previously unnumbered card, and place it at the front of the cards for that section.	
Record name and student number on class cards just issued.	Student
Validate class cards; remove Registrar copy from class card set; place Registrar copy in Section Enrollment File; give remaining copies of class cards to student.	Registrar
Separate Change of Program Form copies and distribute as follows: 1) Registrar 2) Adviser 3) Student	Registrar
Post registration forms with changes of program; remove class card copies from Section Enrollment File for all "drops" noted on the Change of Program forms. Place Change of Program in a history file alphabetized by name.	Registrar


REGISTRAR & DEPARTMENT CHAIRMEN
1 RETURN CLASS CARDS PULLED FOR STUDENTS WHO DID NOT COMPLETE REGISTRATION
2 REVIEW ENROLLMENTS AND ADJUST BALANCES AS NECESSARY
CLASS CARDS
CLASS CARD TUB FILES
CHANGE OF PROGRAM FORM
COURSE REQUEST FORM (STUDENT COPY)
STATEMENT OF DEGREE REQUIREMENTS
STUDENT & ADVISOR
1 REVIEW & REVISE ACADEMIC PROGRAM
2 APPROVE CHANGES
ADVISOR
PREPARE AND SIGN EACH ENTRY ON CHANGE OF PROGRAM FORM
CHANGE OF PROGRAM FORM
REGISTRAR
VERIFY LEGIBILITY & COMPLETENESS OF CHANGE OF PROGRAM FORM
NO
LEGIBLE AND COMPLETE ?
YES
BURSAR
1. COMPUTE & COLLECT FEES
2. VALIDATE CHANGE OF PROGRAM
REGISTRAR
1. PULL CLASS CARDS FOR "ADD" COURSES
2. ADJUST INVENTORY FOR "DROP" COURSE
CLASS CARDS
CHANGE OF PROGRAM FORM
G
G
REGISTRAR
1. VALIDATE CLASS CARDS
2. DISTRIBUTE CLASS CARDS & CHANGE OF PROGRAM FORMS
REGISTRAR COPY
CLASS CARDS (SECTION ENROLLMENTS FILE)
CHANGE OF PROGRAM FORM (ORIGINAL)
CLASS CARDS (COPY)
CHANGE OF PROGRAM FORM (COPY)
TO STUDENT
CHANGE OF PROGRAM FORM (COPY)
TO ADVISOR
REGISTRAR
1 POST REGISTRATION FORMS
2 REMOVE CLASS CARDS FROM FILE, FOR ALL "DROPS"
CHANGE OF PROGRAM FORM (TO HISTORY FILE)
SUB-SYSTEM VI

_____ _____ - COLLEGE

FORM R-501

_____ COLLEGE
OFFICE OF THE REGISTRAR
CHANGE OF PROGRAM FORM

CURRENT HOURS OF REGISTRATION ☐

Student Last Name _____ First Name _____ M.I. _____ Term and Year _____ Date _____

INSTRUCTIONS TO STUDENT

1. Record your name, student number, term and year, and the current total hours for which you are registered
2. Take this form along with your statement of degree requirements and your copy of your course requests to your advisor for consultation.
3. In consultation with your Advisor, record any courses you wish to drop in the columns provided to the right.
4. Record any courses you wish to add in the columns provided to the right
5. Get Advisor approval of ALL drop and add entries made.
6. Bring the change of program form to the Registrar's office for issuance of Class Cards and proper recording.
7. Accommodate the statement below with your signature

I request my registration for classes be changed as indicated above.

_____
Signature of Student

	Dept.	Course #	Section	Time	Days		Hours	Advisor/Instr. Approval
D R O P						–		
						–		
						–		
						–		
TOTAL HOURS DROPPED								
A D D						+		
						+		
						+		
						+		
TOTAL HOURS ADDED								
ADJUSTED TOTAL HOURS								

STUDENT – DO NOT WRITE BELOW THIS LINE

FOR USE BY BURSAR

ADJUSTED FEES	$
FEES PAID	$
DIFFERENCE	$
NET ☐ DUE COLLEGE ☐ DUE STUDENT	$

FORM SIZE – 7" x 8 1/2"

_____
(College Name)

Sub-System VI - Preparation of Class Lists

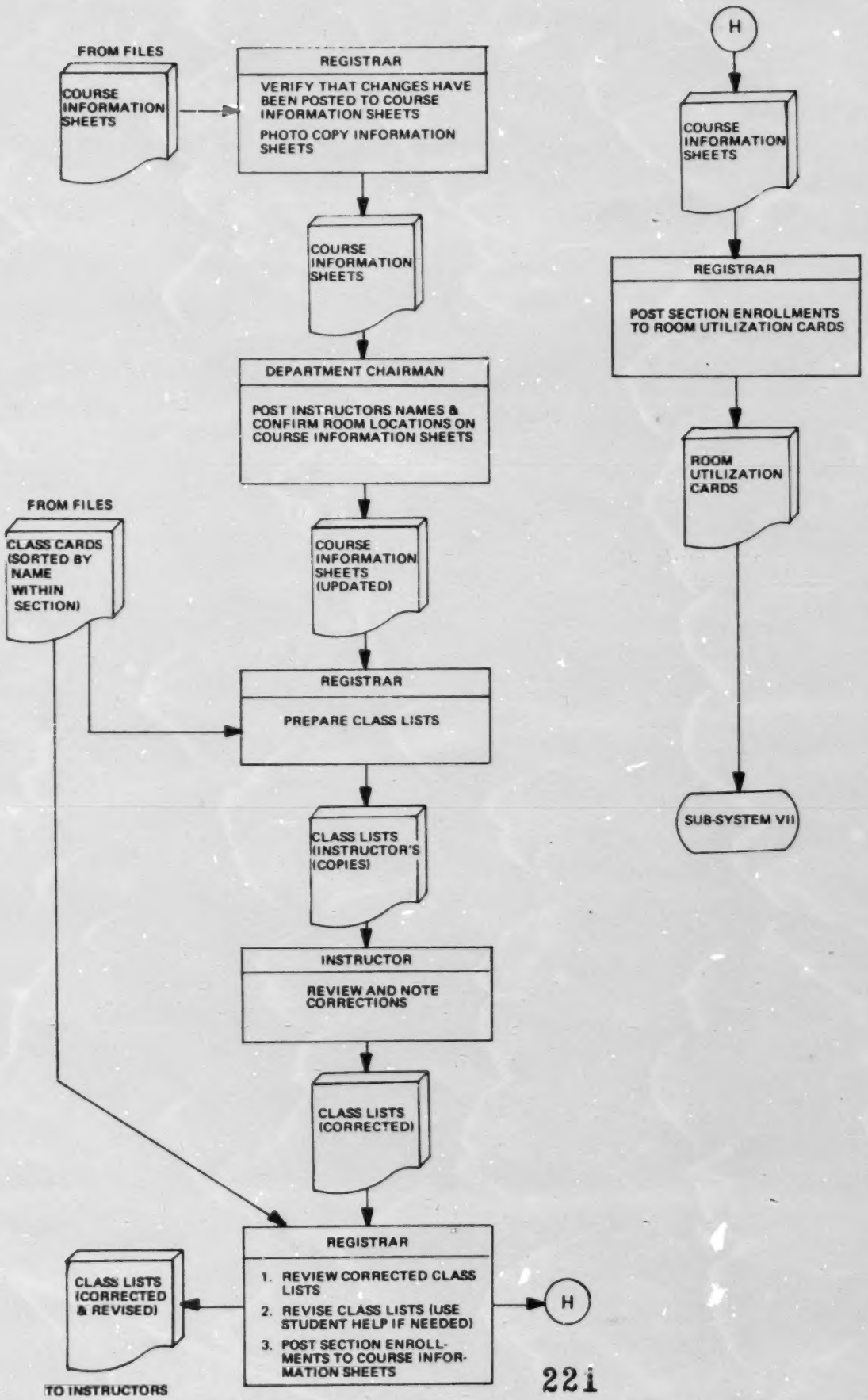
Action	Performed by
Verify that all courses and section changes made during registration have been posted to the course information sheets. Make a photo copy of each course information sheet and forward to the appropriate department.	Registrar
Record instructors names where missing, and confirm room locations for all sections.	Dept. Chairman
Arrange class cards in Section Enrollments file by name within section.	Registrar
Prepare three part class lists (Form R-601). Forward two copies to the instructor; retain one copy for reference.	Registrar
Review and note corrections; return both copies to Registrar.	Instructor
Check instructor notes and corrections against registration forms.	Registrar
Make corrections or call in students to resolve discrepancies if records are in conflict.	Registrar
Post student enrollments by section to course information sheets. If credit hours vary by student within the section, post total credit hours as well;	Registrar

_____
(College Name)

Sub-System VI - Preparation of Class Lists

Action	Performed by
forward corrected Class Lists to instructors through departments.	
Post student enrollments by section to room utilization cards.	Registrar

SUB-SYSTEM VI. Preparation of Class Lists



_____ COLLEGE FORM R 601

CLASS LIST AND INSTRUCTOR GRADE SHEET

TERM _____ YEAR _____

DEPARTMENT _____

COURSE AND SECTION NO. _____

TIME AND DAYS _____

BUILDING & ROOM _____

DESCRIPTIVE TITLE OF COURSE _____

INSTRUCTOR NAME _____

	STUDENT NAME	CLASS	STUDENT NUMBER	CREDIT HOURS	GRADE	COMMENTS
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						
36						
37						
38						
39						
40						
41						
42						
43						
44						
45						

A	B	C	D	F	WP	WF	P	I		
GRADE DISTRIBUTION										Total Students

Total Credit Hours

Page _____ of _____ Pages

222

_____ Signature of Instructor

_____ Date

_____
(College Name)

Sub-System VII - Grade Reporting

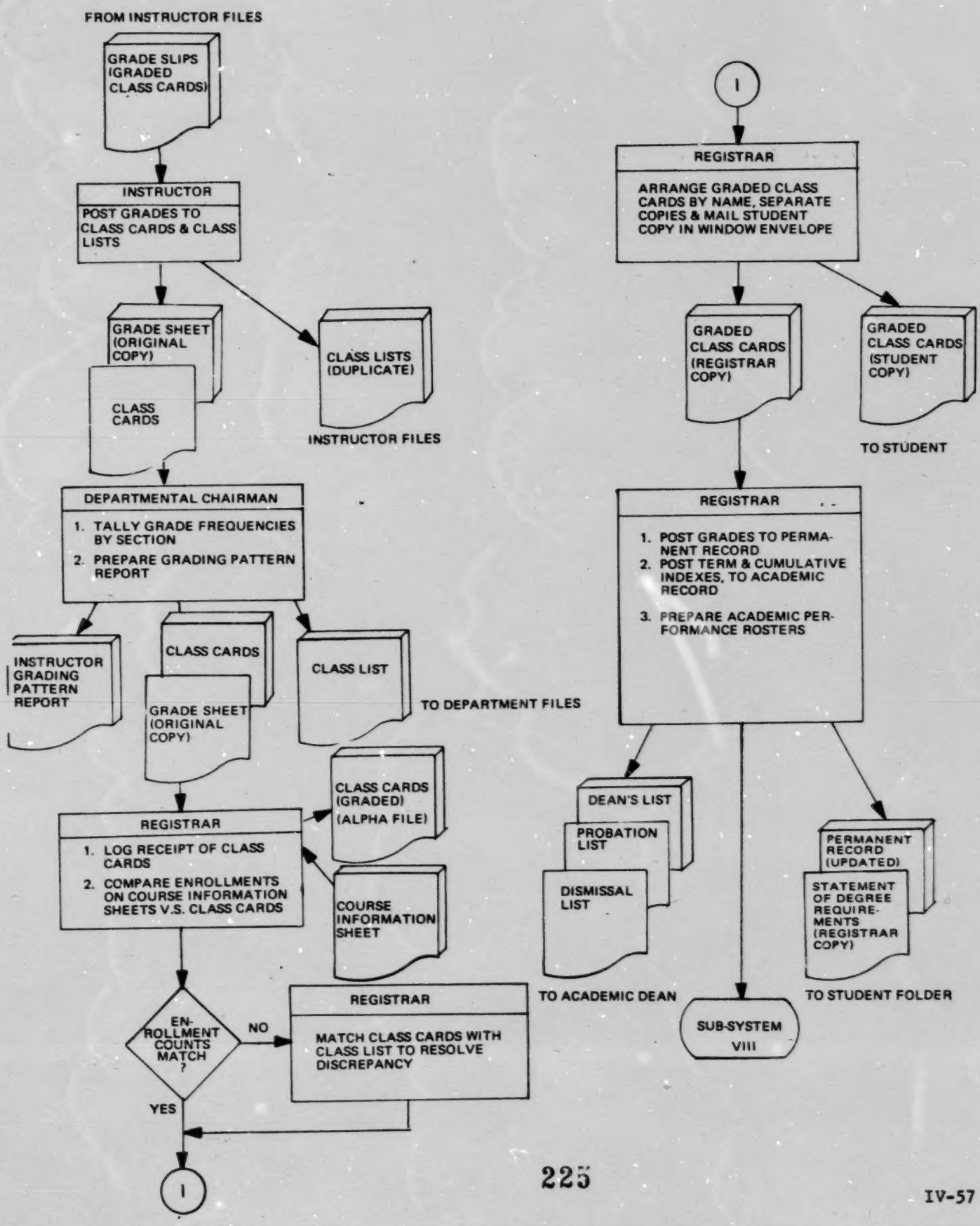
Action	Performed by
Post student grades on class cards (Form R-103) and on Class Lists - Instructor Grade Sheet (Form R-601). (The grade sheet (Form R-601) will serve as the official grade record.) Forward both copies of the Grade Sheet to the department.	Instructor
Tally grade frequencies by section on the Grade Sheet.	Department Chairman
Forward the class cards and the original copy of the Grade Sheet to the Registrar.	Department Chairman
Prepare Report of Instructor Grading Patterns. (Form R-701)	Department Chairman
Log in receipt of class cards on course information sheets. Count class cards and compare to section enrollments posted to course information sheets. If a discrepancy exists, match class cards with corresponding class list copy held by Registrar to determine nature of discrepancy.	Registrar
Arrange graded class cards alphabetically by name.	Registrar
Check to insure that graded class cards have not been turned in for students who have been dismissed, withdrew early in term, are now deceased, or for other reasons should not be receiving grades.	Registrar

_____
(College Name)

Sub-System VII - Grade Reporting, Continued

Action	Performed by
Separate graded class cards. Insert carbon copies in window envelopes - one envelope per student - and mail to student.	Registrar
Post grades to permanent records from original copies of the graded class cards (course information including descriptive title can be typed on continuous form labels during term from information provided on Registration forms).	Registrar
Calculate term and cumulative indexes; post to Student Academic Records.	Registrar
Prepare academic performance rosters for Dean's List, probation, and dismissal action.	Registrar

SUB-SYSTEM VII. Grade Reporting



_____ COLLEGE

REPORT OF INSTRUCTOR GRADING PATTERNS

TERM AND YEAR

DEPARTMENT_____

INSTRUCTOR NAME	COURSE & SECTION	A	B	C	D	E	F	WP	WF		I	Total Students
	TOTALS											

FORM R-701

_____
(College Name)

Sub-system VIII - Permanent Record Maintenance

Action	Performed by
Permanent records are maintained in two files - active and inactive - alphabetically by name. Student folders are maintained in a single file alphabetically by name and include both active and inactive records. Various transactions affecting active and, in some cases, inactive student academic records will be transmitted to the Registrar on an intermittant basis. Common type of transactions will be: . Name and address changes. . Grade changes. . Declarations of major field of study. . Notices of changes in major fields of study. . Notices of course withdrawal. . Notices of withdrawal from college . Notices of dismissial.	

_____
(College Name)

Sub-System VIII - Permanent Record Maintenance (Continued)

Action	Performed by
Post name change to original student record from a Change of Name or Address Form (Form R-801) and prepare a new student folder which reflects the change of name. Move all documentation contained in the original folder to the new folder. The old folder should remain in the file in its original location. Insert a copy of the Name and Address Change Form in the old folder. If the student is currently enrolled, post name change to Registration form and Student Information Card. Send copies of the Name or Address Change Form to the Dean of Students, Public Relations officer and the Bursar. If the student is inactive, send a copy of the Name or Address Change Form to the Alumni Officer.	Registrar
Post change in permanent address to the Student Academic Record in pencil. If the student is currently enrolled, post the Student Information Card also and send copies of the Change in Name or Address Form to the Dean of Students and the Public Relations Officer. (Post change in local address to the Student Information Card. Send copies of the change in Name or Address Form to the Dean of Students and the Public Relations Officer.)	Registrar

_____
(College Name)

Sub-System VIII - Permanent Record Maintenance (Continued)

Action	Performed by
Post change of grade to the Student Academic Record from the Change of Grade Form. (Form R-802) Adjust grade point average accordingly. Post grade change to the original grade sheet prepared by the instructor and retained on file for an extended period. The grade sheet should be so posted that the original grade and the subsequent change with accompanying posting date both appear. A copy of the Change of Grade Form should be mailed to the student for his records.	Registrar

_____
(College Name)

Sub-System VIII - Permanent Record Maintenance (Continued)

Action	Performed by
Post declaration of major on Student Academic Record upon notification by academic department. Post changes of major to the Student Academic Record from the Change of Major Field Notification Form. (Form R-803) File the original copy of the change of major form in the student folder. Forward copies to the Dean of Students and Public Relations Officer.	Registrar
Post notices of course withdrawal to the student academic records from class cards submitted by the instructors and approved by the student advisors. If student withdraws prior to date on which withdrawal must be reflected on his academic record, remove corresponding class card from Section Enrollment file. If the withdrawal is to appear on his academic record, instructor should retain class cards and include with regular submission of graded class cards.	Registrar

_____
(College Name)

Sub-System VIII - Permanent Record Maintenance (Continued)

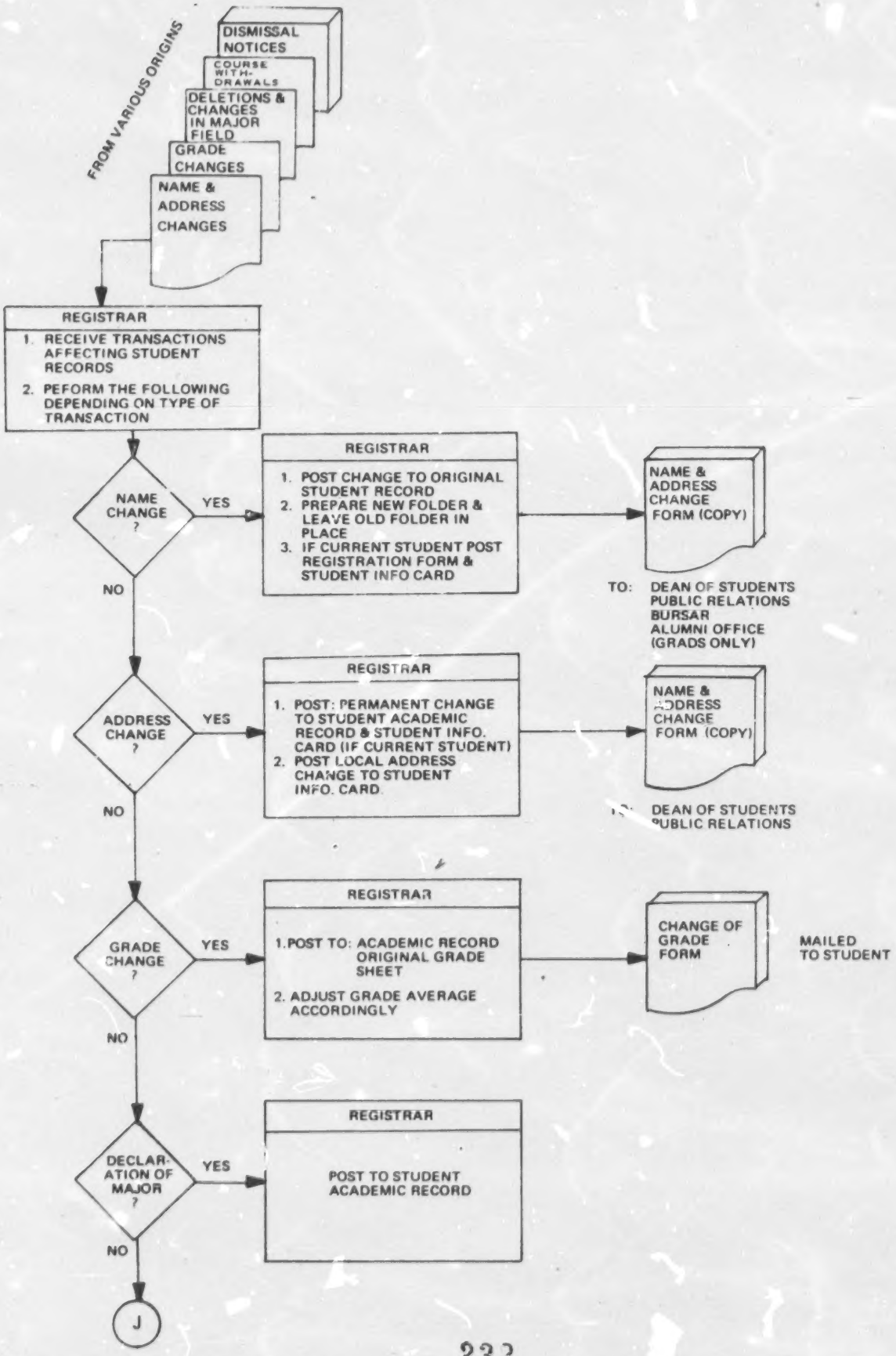
Action	Performed by
Post notices of withdrawal from college received from the Academic Dean or Dean of Students to the Student Academic Record from the Withdrawal from College Form (Form R-804). Check Selective Service, Social Security and Veterans Administration record files; make appropriate notification as necessary. Post the date of withdrawal on the Student Information Card and the Registration Form. If the student is withdrawing prior to the date on which his course enrollments must be reflected on his academic record, remove student's class cards from the Section Enrollment file; post withdrawal date to Registrar's copy of class list; stamp each card "Withdrew from College Effective _____;" post the date; and forward class cards to the appropriate instructors. Otherwise, the Section Enrollment file is not adjusted since graded class cards will be turned in for the student. Initial a detached copy of the Withdrawal from College Form and send to Business Office signifying academic clearance of withdrawal. File remaining copy in student folder.	Registrar

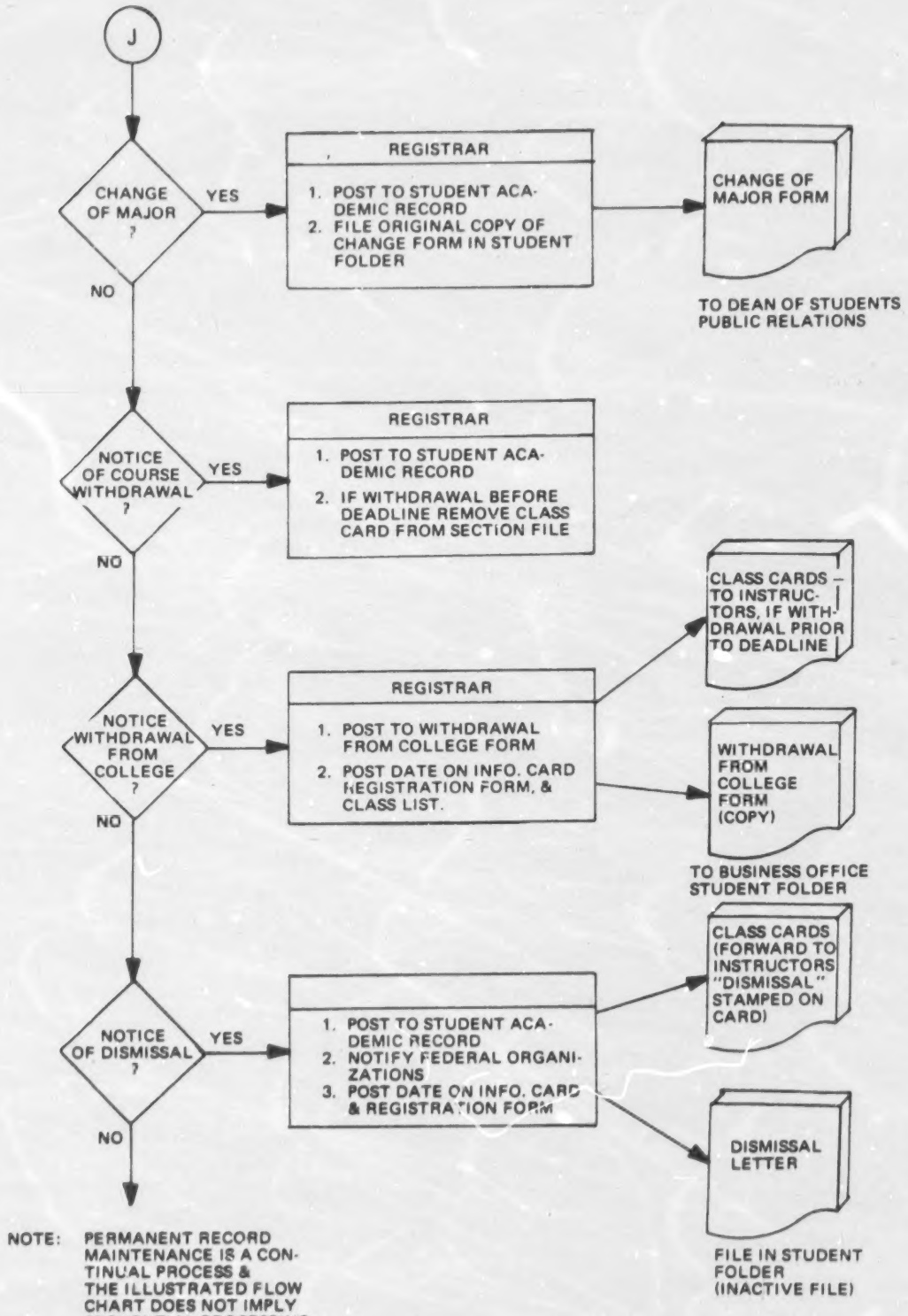
_____
(College Name)

Sub-System VIII - Permanent Record Maintenance (Continued)

Action	Performed by
Post notices of dismissal received from the Academic Dean or Dean of Students to the Student Academic Record. Check Selective Service, Social Security and Veterans Administration record files; make appropriate notifications as necessary. Post the date of dismissal on the Student Information Card and the Registration Form. File the permanent record in the inactive file. Remove student's class cards from the Section Enrollment File. Stamp word "Dismissal" on cards, post date, and forward to instructors. File dismissal letter in student folder.	Registrar

SUB-SYSTEM VIII. Permanent Record Maintanance




J
CHANGE OF MAJOR ?
YES
NO
REGISTRAR
1. POST TO STUDENT ACADEMIC RECORD
2. FILE ORIGINAL COPY OF CHANGE FORM IN STUDENT FOLDER
CHANGE OF MAJOR FORM
TO DEAN OF STUDENTS PUBLIC RELATIONS
NOTICE OF COURSE WITHDRAWAL ?
YES
NO
REGISTRAR
1. POST TO STUDENT ACADEMIC RECORD
2. IF WITHDRAWAL BEFORE DEADLINE REMOVE CLASS CARD FROM SECTION FILE
NOTICE WITHDRAWAL FROM COLLEGE ?
YES
NO
REGISTRAR
1. POST TO WITHDRAWAL FROM COLLEGE FORM
2. POST DATE ON INFO. CARD REGISTRATION FORM, & CLASS LIST.
CLASS CARDS – TO INSTRUCTORS, IF WITHDRAWAL PRIOR TO DEADLINE
WITHDRAWAL FROM COLLEGE FORM (COPY)
TO BUSINESS OFFICE STUDENT FOLDER
NOTICE OF DISMISSAL ?
YES
NO
1. POST TO STUDENT ACADEMIC RECORD
2. NOTIFY FEDERAL ORGANIZATIONS
3. POST DATE ON INFO. CARD & REGISTRATION FORM
CLASS CARDS (FORWARD TO INSTRUCTORS "DISMISSAL" STAMPED ON CARD)
DISMISSAL LETTER
FILE IN STUDENT FOLDER (INACTIVE FILE)

NOTE: PERMANENT RECORD MAINTENANCE IS A CONTINUAL PROCESS & THE ILLUSTRATED FLOW CHART DOES NOT IMPLY SEQUENTIAL PROCESSING

FORM R-801

_____ COLLEGE

_____ College

CHANGE OF NAME OR ADDRESS FORM

_____ _____ _____

Student Last Name First Name Middle Initial | Student Number | Date

PLEASE CHANGE THE COLLEGE RECORDS TO SHOW MY NEW

☐ Name

☐ Permanent Address

☐ Local Address as Shown Below

_____

STUDENT SIGNATURE

NAME CHANGE

MY NEW NAME IS _____

Last Name First Name Middle Name

NOTE: IF THE NAME CHANGE IS DUE TO MARRIAGE, DOCUMENTATION IN SUPPORT OF THIS FORM IS NOT REQUIRED. OTHERWISE, A COPY OF THE COURT ORDER LEGALIZING THE CHANGE SHOULD ACCOMPANY THIS FORM.

CHANGE IN PERMANENT ADDRESS

FORMER ADDRESS	NEW ADDRESS
_____ STREET ADDRESS	_____ STREET ADDRESS
_____ CITY AND STATE	_____ CITY AND STATE
_____ TELEPHONE NUMBER	_____ TELEPHONE NUMBER

EFFECTIVE DATE:

CHANGE IN LOCAL ADDRESS

FORMER ADDRESS	NEW ADDRESS
_____ STREET ADDRESS	_____ STREET ADDRESS
_____ CITY AND STATE	_____ CITY AND STATE
_____ DORMITORY _____ TELEPHONE NUMBER	_____ DORMITORY _____ TELEPHONE NUMBER

EFFECTIVE DATE:

_____COLLEGE

CHANGE OF GRADE FORM

Miss
Mr.
Mrs.

Student's Name: _____

Course: _____

Date Taken: Fall_____, Spring_____, Summer_____
Year Year Year

Grade Formerly Reported: _____

Now Changed To: _____

_____
Instructor's Signature Date

Form Size - 5 1/2" x 8 1/2"

_____ COLLEGE

CHANGE OF MAJOR FIELD
NOTIFICATION FORM

Student Name _____ Student Number _____

NOTIFICATION OF DEPARTMENT FROM WHICH STUDENT IS TRANSFERRING HIS MAJOR

This Department has been notified by the above named student that he is transferring his major field of study to another Department.

_____
Signature of Department Representative

_____ _____
Department Date

NOTIFICATION OF DEPARTMENT TO WHICH STUDENT IS TRANSFERRING HIS MAJOR

This Department accepts _____ into its major program of study. A statement of degree requirements has been prepared and issued to the above named student. A copy is attached.

_____
Signature of Department Representative

_____ _____
Department Date

FORM R-804

_____ COLLEGE

WITHDRAWAL FROM COLLEGE FORM

Student Name_____ Student Number_____ Class_____

_____ has been permitted to withdraw officially.

_____ has been withdrawn unofficially with failing grades

Effective date of withdrawal is _____

This student's reason(s) for withdrawal is (are) checked below

_____ Financial Difficulty

_____ Academic Difficulty

_____ Health

_____ Planning to enter Military Service

_____ Planning Transfer

_____ Planning to Marry

_____ Has lost interest in college

_____ Other _____

Date_____ Academic Dean_____

TO THE STUDENT:

TO ACCOMPLISH PROPER WITHDRAWAL FROM THE COLLEGE, IT IS NECESSARY THAT YOU CLEAR YOU STATUS WITH THE SEVERAL OFFICES CHECKED BELOW, OBTAIN CLEARANCE VERIFICATION FROM EACH OFFICE AND THEN RETURN THIS FORM TO THE BUSINESS OFFICE.

_____Housing Office	_____ Signature	_____ Date
_____Major Department	_____ Signature	_____ Date
_____Financial Aid Office	_____ Signature	_____ Date
_____Dining Office	_____ Signature	_____ Date
_____Dean of Students	_____ Signature	_____ Date
_____Library	_____ Signature	_____ Date
_____Registrar	_____ Signature	_____ Date
_____Business Office	_____ Signature	_____ Date

_____

(College Name)

Sub-System IX - Certification to Federal Agencies

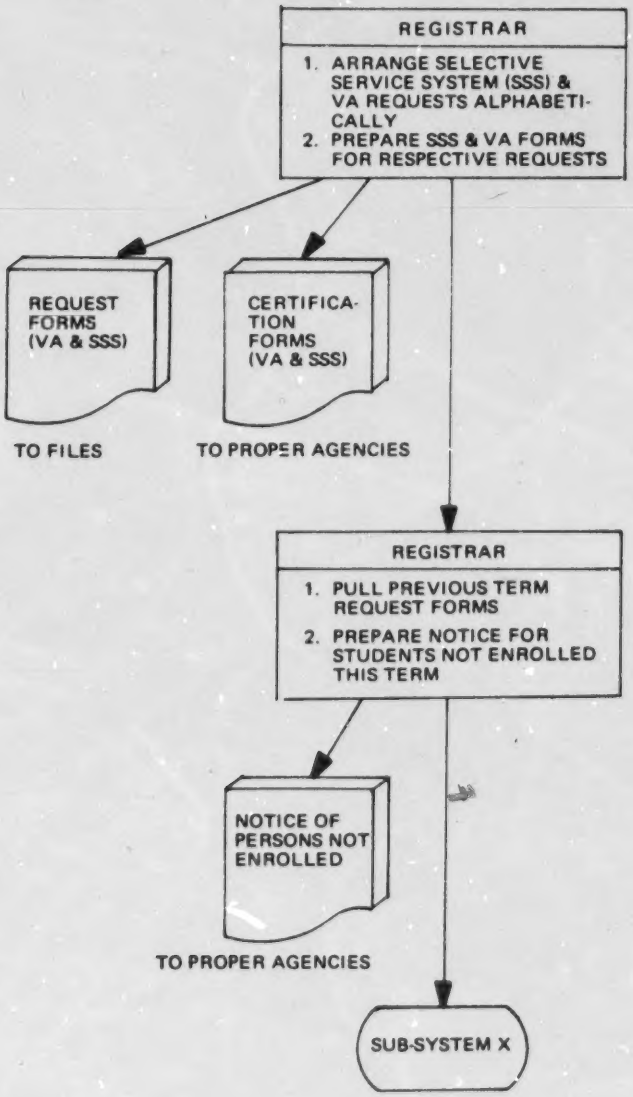
Action	Performed by
Arrange Selective Service Notification Requests and VA Enrollment Certification Request forms alphabetically by name.	Registrar
Prepare SSS Form 109 from each Selective Service Notification Request form and VA Form 21E-1999 (for continuing students) from VA Enrollment Certification Request Forms. Utilize Registration Card File as reference for current course load data. (First time certification of applicants for veterans benefits is accomplished on the back of the Certificate of Eligibility VA Form 21E-1993a upon its receipt from the VA).	Registrar
Mail certification forms to appropriate agencies and file request forms by name and term in files established for that purpose.	Registrar
Pull previous term request forms from the files and match them to the current term registration forms. Prepare appropriate notice (Selective Service --- SSS109, Student Certificate or SSS103, Graduate or Professional	Registrar

_____
(College Name)

Sub-System IX - Certification to Federal Agencies, Continued

Action	Performed by
College Student Certificate; Veterans Administration --- VA Form 21E-1999b, Notice of Change in Student Status; Social Security --- SSA1542, Notice of Cessation of Full Time Attendance) of change forms for students who have not re-enrolled (refer to a graduation list to determine those students who have not returned by reason of graduation) and forward to the agencies concerned. Note: For further information on Veterans Administration Certification procedures, see Certification of Students Under Veterans Laws, The American Association of Collegiate Registrars and Admissions Officers, August 1967.	

SUB-SYSTEM IX. Certification to Federal Agencies


REGISTRAR
1. ARRANGE SELECTIVE SERVICE SYSTEM (SSS) & VA REQUESTS ALPHABETICALLY
2. PREPARE SSS & VA FORMS FOR RESPECTIVE REQUESTS
REQUEST FORMS (VA & SSS)
CERTIFICATION FORMS (VA & SSS)
TO FILES
TO PROPER AGENCIES
REGISTRAR
1. PULL PREVIOUS TERM REQUEST FORMS
2. PREPARE NOTICE FOR STUDENTS NOT ENROLLED THIS TERM
NOTICE OF PERSONS NOT ENROLLED
TO PROPER AGENCIES
SUB-SYSTEM X

_____
(College Name)

Sub-System X - Degree Audit

Action	Performed by
Pick up Statement of Degree Requirements from major department. (Department has listed courses and credits required for the degree in the column provided.)	Student
Complete the Statement of Degree Requirements, filling in the courses taken in satisfaction of the requirements, each course to be listed on the same line as the requirement it is intended to satisfy. Record hours, term, year and grade for each course, referencing the Statement of Degree Requirements maintained by the student during his program.	
Review, note, and authorize exceptions and substitutions to the prescribed program.	Academic Advisor
Pay graduation fee and obtain validated Application for Degree Form (Form R-1001).	Student/Business Officer
Submit authorized Statement of Degree Requirements and Application for Degree to the Registrar.	Student
Use Application for Degree form as a reference in preparing graduate lists for the diploma company and the commencement program printer.	Registrar

_____
(College Name)

Sub-System X - Degree Audit (Continued)

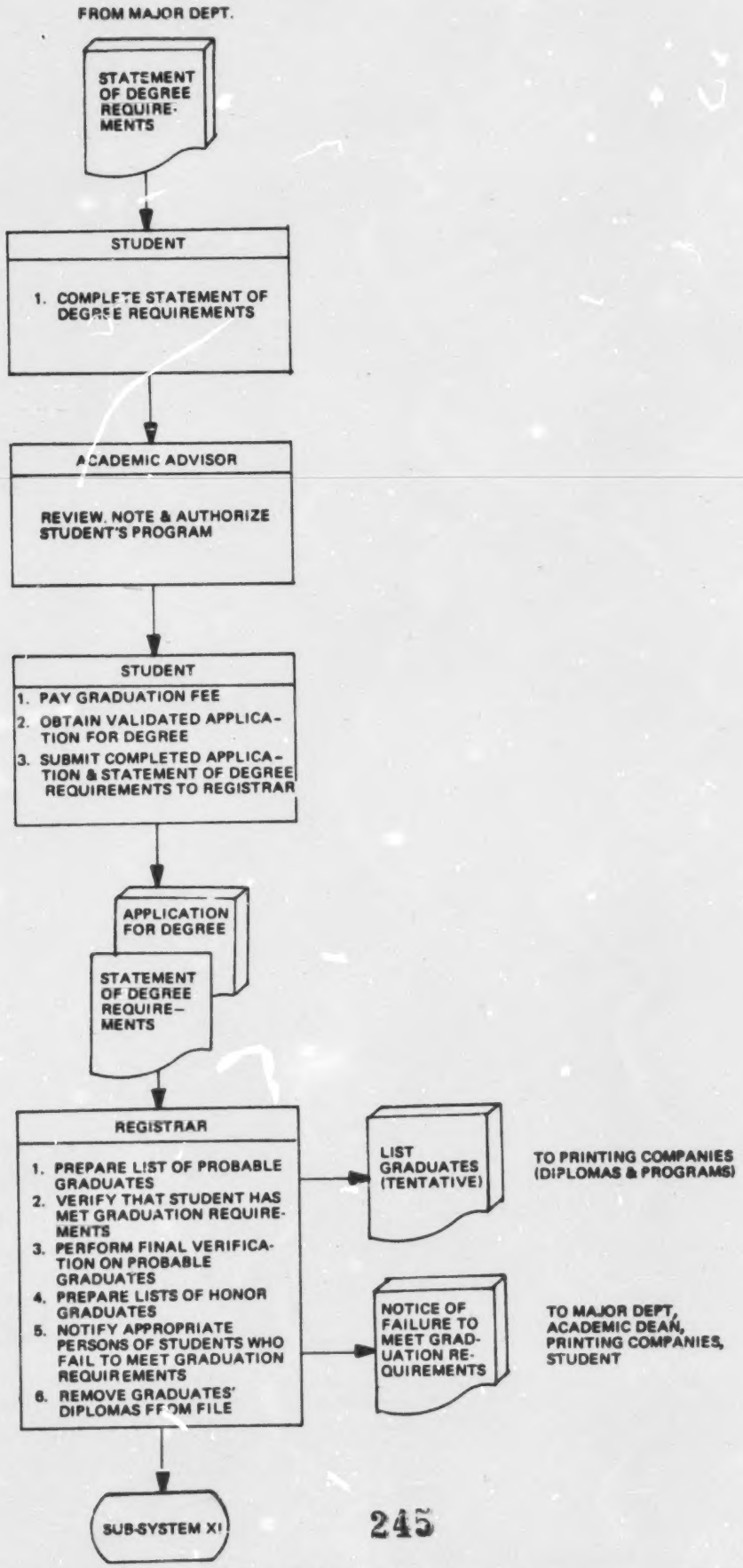
Action	Performed by
Check current enrollments listed on Statement of Degree Requirements against Current Registration Cards.	Registrar
Check the Statement of Degree Requirements against the permanent record for courses previously taken.	Registrar
Verify that student has met any index requirements and residence requirements. Note any students with low indexes who may be ineligible to graduate if they were to fail one or more courses.	Registrar
If a student has applied for graduation but his record does not meet normal requirements notify the student, the appropriate major department, and the academic Dean.	Registrar
As grades are received during the period just prior to graduation, perform a "last minute" review, checking Jr. failures in required courses, insufficient total credits and inadequate cumulative grade index	Registrar
Prepare list of students who are graduating with academic honors.	Registrar

_____
(College Name)

Sub-System X - Degree Audit (Continued)

Action	Performed by
If the last minute check detects degree candidates who have failed to complete their degree requirements by failing to complete their final term work satisfactorily, notify the student, the commencement coordinator, the academic Dean, and, if time permits, the commencement program printer. Remove diplomas from the file of those to be awarded.	Registrar

SUB-SYSTEM X Degree Audit


FROM MAJOR DEPT.
STATEMENT OF DEGREE REQUIRE-MENTS
STUDENT
1. COMPLETE STATEMENT OF DEGREE REQUIREMENTS
ACADEMIC ADVISOR
REVIEW, NOTE & AUTHORIZE STUDENT'S PROGRAM
STUDENT
1. PAY GRADUATION FEE
2. OBTAIN VALIDATED APPLICA-TION FOR DEGREE
3. SUBMIT COMPLETED APPLICA-TION & STATEMENT OF DEGREE REQUIREMENTS TO REGISTRAR
APPLICATION FOR DEGREE
STATEMENT OF DEGREE REQUIRE-MENTS
REGISTRAR
1. PREPARE LIST OF PROBABLE GRADUATES
2. VERIFY THAT STUDENT HAS MET GRADUATION REQUIRE-MENTS
3. PERFORM FINAL VERIFICA-TION ON PROBABLE GRADUATES
4. PREPARE LISTS OF HONOR GRADUATES
5. NOTIFY APPROPRIATE PERSONS OF STUDENTS WHO FAIL TO MEET GRADUATION REQUIREMENTS
6. REMOVE GRADUATES' DIPLOMAS FROM FILE
LIST GRADUATES (TENTATIVE)
TO PRINTING COMPANIES (DIPLOMAS & PROGRAMS)
NOTICE OF FAILURE TO MEET GRAD-UATION RE-QUIREMENTS
TO MAJOR DEPT, ACADEMIC DEAN, PRINTING COMPANIES, STUDENT
SUB-SYSTEM XI

APPLICATION FOR DEGREE

I hereby certify that I expect to complete requirements for the degree of BA☐ AB☐ BS☐ Other☐ by the following date_____.

I wish my name to appear on the diploma as follows:

_____

(PLEASE PRINT CLEARLY)

I find it necessary to request that the degree be conferred in absentia.

Signature_____
Signature

Address _____

_____

_____

INSTRUCTIONS TO STUDENT:
This form is valid only when stamped by the Business Office upon payment of the Graduation Fee.

Bus. Off. Validation

FORM SIZE - 5 1/2" x 8 1/2"

_____
(College Name)

Sub-System XI - Processing Transcript Requests

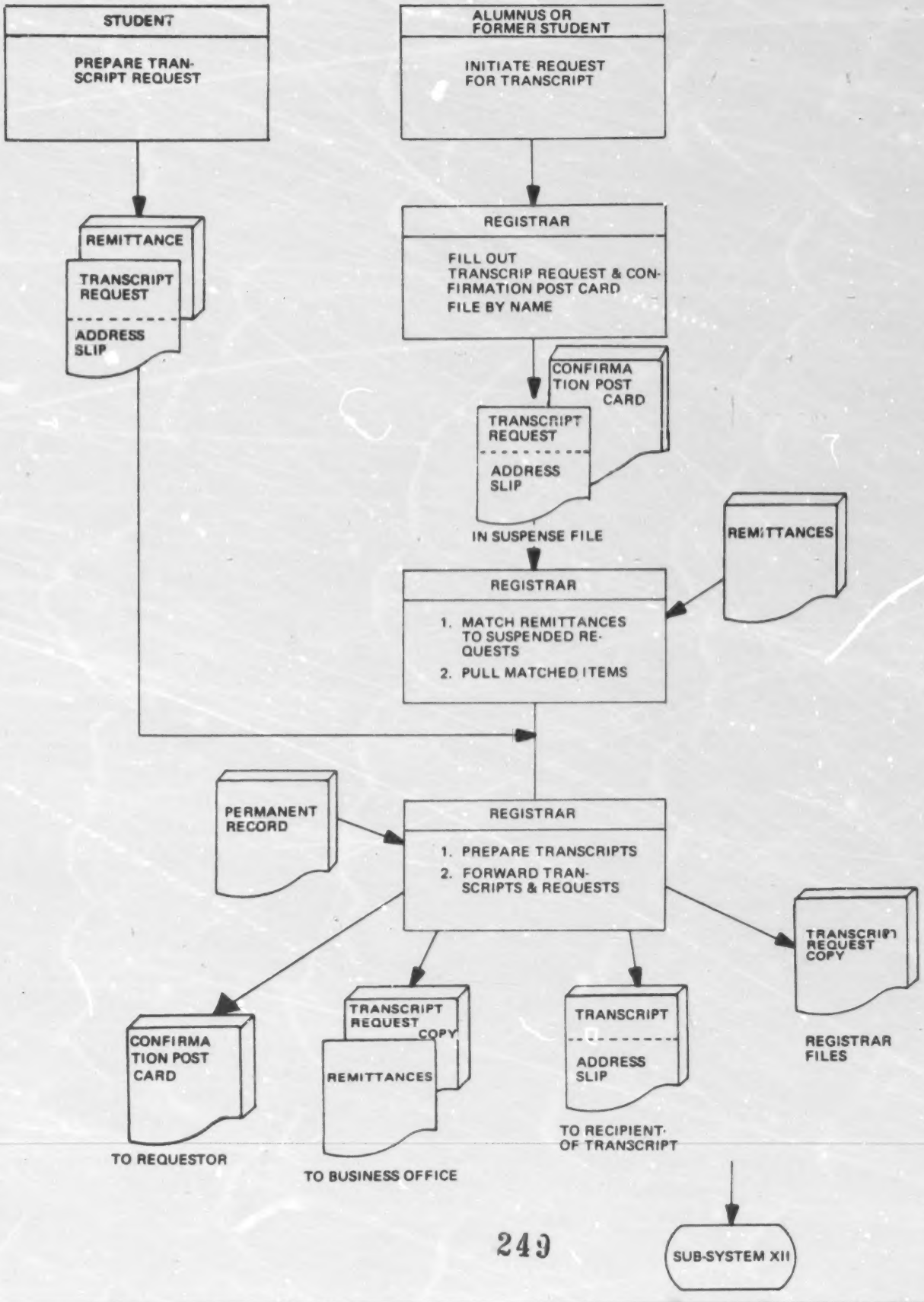
Action	Performed by
Prepare Transcript Request (Form R-1101). Payment for transcripts should be made at the time request is presented.	Student
Initiate Request for Transcript by letter or telephone.	Alumnus or Former Student
Fill out Transcript Request for requests received from alumni or former students; record name and address of requestor on a post card to be used for confirmation that transcript(s) was mailed; inform requestors that transcripts will be released: (a) if there are no outstanding obligations to the institution which the requestor has neglected to satisfy; and (b) when payment for the transcript is received.	Registrar
Place requests and accompanying post cards in a transcript suspense file pending availability of student academic records and receipt of remittances.	Registrar
Match remittances to suspended transcript requests and pull matched items.	Registrar
Prepare transcripts. Insert address slips and transcripts in window envelopes. Mail transcripts and post cards.	Registrar

_____
(College Name)

Sub-System XI - Processing Transcript Requests, continued

Action	Performed by
Forward remittances and copies of the transcript request to the Business office. (For good internal control, the cash receipts and transcript processing functions should not be assigned to the same clerk.)	Registrar
File request copy.	Registrar

SUB-SYSTEM XI Processing Transcript Requests



FORM R-1101

_____ College

TRANSCRIPT REQUEST

_____
Date

Print legibly
Your Name _____ Student Number _____
Last First M.

No. Ordered — To be sent to:* (Print here the name & address of place(s) to which you want your transcript sent)

☐ _____ Name _____ Address _____ State

☐ _____ Name _____ Address _____ State

☐ _____ Name _____ Address _____ State

☐ Will call.

The minimum charge on each transcript order is _____. Whenever two or more copies are requested on the same order, the charge for the first copy is _____ and each additional copy is _____.

Fee _____ Paid _____ Total ☐

*Fill out an address slip for each recipient. It will be used in a window envelope for mailing your record.

. . . . . .

ADDRESS SLIP

PRINT LEGIBLY IN THE ADDRESS BOX BELOW: {the name & address of the office, firm, institution, agency or person to whom you wish your record sent.

Name
Street or Institution
City & State

_____
Student's Name (Print)

The enclosed record is sent at the request of the student.

OFFICE OF THE REGISTRAR

_____ COLLEGE

250

Note: Supplemental copies of the lower part of this form (address slip) would be used to record additional addresses.

_____
(College Name)

Sub-System XII - Management Reporting

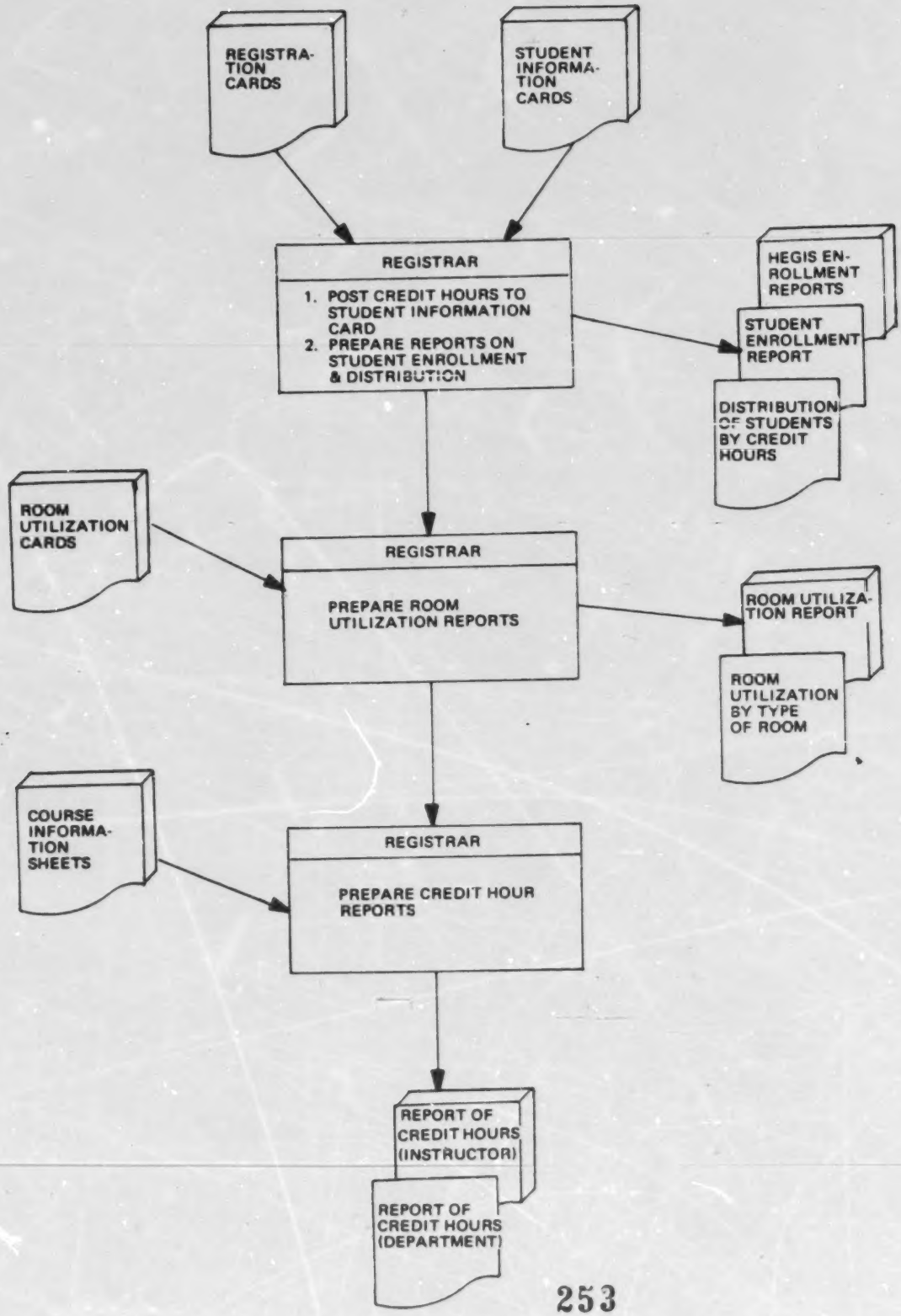
Action	Performed by
Post Credit Hours carried from registration forms to student information cards upon termination of change of program period.	Registrar
Prepare Student Enrollment Report (Form R-1201) and Distribution of Students By Credit Hours (Form R-1202) from data provided on Student Information Cards.	Registrar
Prepare Higher Education General Information Survey (HEGIS) enrollments reports (Undergraduate Enrollment By Subject Area, Graduate Enrollment by Subject Area, Residence and Migration) from data provided on the Student Information Card.	Registrar
Summarize total sections scheduled, total periods in use, and total student stations occupied on each room utilization card.	Registrar
Prepare Room Utilization Report (Form R-1203) and Room Utilization by Type of Room (Form R-1204) from data provided on Room Utilization cards.	Registrar

_____
(College Name)

Sub-System XII - Management Reporting

Action	Performed by
Prepare Report of Credit Hours Produced by Instructor (Form R-1205) and Report of Credit Hours Produced by Department (Form R-1206) from data provided on course information sheets.	Registrar

SUB-SYSTEM XII Management Reporting



_____ COLLEGE

STUDENT ENROLLMENT REPORT

TERM AND YEAR

REPORT PREPARED AS OF _____ DATE

CATAGORY	GRAND TOTAL	FULL-TIME STUDENTS							PART-TIME STUDENTS						
		TOTAL	FR	SO	JR	SR	GR	OTHER	TOTAL	FR	SO	JR	SR	GR	OTHER
ALL STUDENTS															
FIRST-TIME FRESHMEN TRANSFER STUDENTS CONTINUING STUDENTS RETURNING STUDENTS															
MALE STUDENTS FEMALE STUDENTS															
MARRIED STUDENTS SINGLE STUDENTS															
DAY STUDENTS RESIDENT STUDENTS															

FORM R-1201

_____ COLLEGE

DISTRIBUTION OF STUDENTS BY CREDIT HOURS

HOURS CARRIED BY STUDENT	NUMBER OF STUDENTS	FULL-TIME EQUIVALENT STUDENTS	SEX		CLASS					
			MALE	FEMALE	FR	SO	JR	SR	GR	Other
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
TOTALS										

_____ COLLEGE

FORM R-1203

ROOM UTILIZATION REPORT

TERM AND YEAR

BUILDING	ROOM NUMBER	TYPE	HOURS AVAILABLE	PERIODS IN USE	% HOURS IN USE	STUDENT STATIONS AVAILABLE	STUDENT STATIONS USED	% STU. STA. USED

_____ COLLEGE

FORM R-1204

ROOM UTILIZATION BY TYPE OF ROOM

TERM AND YEAR

TYPE OF ROOM	NUMBER OF ROOMS	HOURS AVAILABLE	HOURS IN USE	% TIME IN USE
1. SEMINAR ROOMS				
5-15 STUDENT STATIONS				
2. CLASSROOMS				
16-30 STUDENT STATIONS				
31-50 STUDENT STATIONS				
3. LECTURE HALLS				
51-100 STUDENT STATIONS				
OVER 100 STUDENT STATIONS				
4. LABORATORIES				
1-10 STUDENT STATIONS				
11-20 STUDENT STATIONS				
OVER 20 STUDENT STATIONS				

_____ COLLEGE

REPORT OF CREDIT HOURS PRODUCED BY INSTRUCTOR

TERM AND YEAR

DEPARTMENT	INSTRUCTOR NAME	NUMBER OF SECTIONS	TOTAL STUDENT ENROLLMENT	TOTAL CREDIT HOURS	AVERAGE SECTION SIZE	AVE. CRED. HRS/SECT.

FORM R-1205

_____ COLLEGE FORM R-1206

REPORT OF CREDIT HOURS PRODUCED BY DEPARTMENT

TERM AND YEAR

DEPARTMENT	NO. OF COURSES	NO. OF SECTIONS	TOTAL STUDENT ENROLLMENTS	TOTAL CREDIT HOURS	AVG. SECTION SIZE	LARGEST SECTION	SMALLEST SECTION	AVG. CR. HRS. PER SECT.
TOTALS								